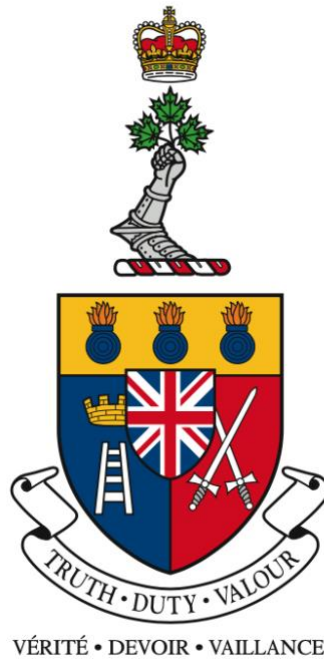


**CANADA IN UKRAINE 2014-2022**  
Sharing the Burden on a Budget

**LE CANADA DANS L'UKRAINE 2014-2022**  
Partager la charge sur un budget



A Thesis Submitted to the Division of Graduate Studies of the Royal Military College of Canada  
by

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## **Dedication**

I dedicate this thesis to the brave Ukrainian sergeants who worked with Canadian Armed Forces during rotation eleven of Operation UNIFIER. The soldiers, sailors, marines, aviators, air assaulters, national guard and special forces operators who underwent courses mentored by Canadian military trainers at the NCO Training Centres are now the tip of spear leading the fight against the Russian invasion. This thesis is dedicated to them and to the heroes who have fallen in defence of Ukraine.

I also dedicate this thesis to my team, the NCO Development Group of rotation eleven Operation UNIFIER whom I had the honour and privilege of commanding. It was the professional competence and tireless efforts of our Canadian NCOs that advanced the NCO Training Centres of the Armed Forces of Ukraine and the National Guard of Ukraine and improved the capability of Ukrainian NCOs. Their efforts directly contributed to the junior leadership successes of Ukrainian security forces during the war in 2022.

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## Abstract

Despite the size and reach of its armed forces and influence, Russia has a relatively small economy and little real influence on an international scale beyond its immediate region. Russia sought to change this reality by force in its invasion of Ukraine first in 2014 by proxy and second in 2022 with regular units of the Russian Armed Forces. Canada responded strongly to the 2014 Russian incursion into Ukraine with sanctions against Russia and deployment of Canadian Armed Forces foreign military training and development assistance for Ukraine. Why Canada? Is Canada threatened by Russian aggression, or was Canada's deployment of troops intended to prove its commitment to assume its share of NATO's collective defence burden without increasing spending to the Alliance's target levels? Canada as a founding member of NATO is committed to collective defence and NATO's Article 10 open door policy. Canada, however, is not committed to meeting the individual member defence spending targets of 2% of GDP to be spent on defence spending which the Alliance has declared necessary to achieve such an effect. However, money does not solve all problems. The NATO expenditure guideline is one of many useful metrics to gage a country's commitment to collective defence. Canada's Security Force Capacity Building (SFCB) mission in Ukraine, Operation UNIFIER, was a low-risk option to contribute to countering an encroaching threat in a politically and economically safe way. Deploying advisors to Ukraine achieved strategic objectives and international commitments without increasing defence spending. Deeds matter, and Canada hoped to convince its allies that defence capacity and deploy-ability matter more than dollars and cents. After Russia's invasion of Ukraine in February 2022 and Canada's Joint Task Force – Ukraine repositioned in Poland, Canada was congratulated on the international stage for its efforts in developing and supporting Ukrainian security forces. Canada's SFCB mission to Ukraine was a demonstration of commitment to NATO and partners on a deliberately limited defence budget. Allies have understandably long called for "more Canada." In Ukraine they got it.

## Résumé

Malgré la taille et la portée de ses forces armées et de son influence, la Russie a une économie relativement petite et peu d'influence réelle à l'échelle internationale au-delà de sa région immédiate. La Russie a cherché à changer cette réalité par la force lors de son invasion de l'Ukraine d'abord en 2014 avec les forces irrégulières et ensuite en 2022 avec des unités régulières des forces armées russes. Le Canada a réagi vigoureusement à l'incursion russe en Ukraine en 2014 par des sanctions contre la Russie et le déploiement d'une formation militaire étrangère des Forces armées canadiennes et d'une aide au développement pour l'Ukraine. Pourquoi Canada? Le Canada est-il menacé par une agression russe, ou le déploiement de troupes du Canada visait-il à prouver son engagement à assumer sa part du fardeau de la défense collective de l'OTAN sans augmenter les dépenses jusqu'aux niveaux cibles de l'Alliance ? Le Canada, en tant que membre fondateur de l'OTAN, est attaché à la défense collective et à la politique de la porte ouverte de l'article 10 de l'OTAN. Le Canada, cependant, ne s'est pas engagé à atteindre les objectifs de dépenses de défense des membres individuels de 2 % du PIB à consacrer aux dépenses de défense que l'Alliance a déclaré nécessaires pour obtenir un tel effet. Cependant, l'argent ne résout pas tous les problèmes. La ligne directrice des dépenses de l'OTAN est l'une des nombreuses mesures utiles pour garantir l'engagement d'un pays en matière de défense collective. La mission de renforcement des capacités des forces de sécurité (SFCB) du Canada en Ukraine, l'opération UNIFIER, était une option à faible risque pour contribuer à contrer une menace envahissante d'une manière politiquement et économiquement sûre. Le déploiement des formateurs en Ukraine a permis d'atteindre des objectifs stratégiques et des engagements internationaux sans augmenter les dépenses de défense. Les actes comptent, et le Canada espérait convaincre ses alliés que la capacité de défense et la capacité de déploiement comptent plus que les dollars et les cents. Après l'invasion de l'Ukraine par la Russie en février 2022 et le repositionnement de la Force opérationnelle interarmées du Canada - Ukraine en Pologne, le Canada a été félicité sur la scène internationale pour ses efforts dans le développement et le soutien des forces de sécurité ukrainiennes. La mission SFCB du Canada en Ukraine a été une démonstration de l'engagement envers l'OTAN et ses partenaires avec un budget de défense délibérément limité. Les alliés réclament depuis longtemps, et c'est compréhensible, « plus de Canada ». En Ukraine, ils l'ont eu.

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## Abbreviations

ABCA: America, Britain, Canada, Australia, New Zealand  
ADM(POL): Assistant Deputy Minister (Policy)  
AFU: Armed Forces of Ukraine  
AO: Area of Operations  
ASW: Anti-Submarine Warfare  
BG: Battle Group  
CAF: Canadian Armed Forces  
CBRN: Chemical Biological Radiological Nuclear  
CJOC: Canadian Joint Operations Command  
COS: Chief of Staff  
CPMU: Canadian Police Mission in Ukraine  
CTAT: Canadian Training and Advisory Team  
CUPDP: Canada-Ukraine Police Development Project  
DEEP: Defence Education Enhancement Program  
DNR: Donetsk Peoples' Republic  
eFP: enhanced Forward Presence  
EU: European Union  
GAC: Global Affairs Canada  
GDP: Gross Domestic Product  
HN: Host Nation  
ISAF: International Security Assistance Force  
JTF-U: Joint Task Force – Ukraine  
LNR: Luhansk Peoples' Republic  
MCC: Multinational Coordination Centre  
MJC: Multinational Joint Commission  
NATO: North Atlantic Treaty Organization  
NCO: Non-Commissioned Officer  
NGU: National Guard of Ukraine  
NORAD: North American Aerospace Defence Command  
NRC: NATO-Russia Council  
OECD: Organization for Economic Cooperation and Development  
Op: Operation  
OSCE: Organization for Security and Cooperation in Europe  
PfP: Partnership for Peace  
SAT: Systems Approach to Training  
SFCB: Security Force Capacity Building  
SFU: Security Forces of Ukraine  
SOF: Special Operations Forces  
SSR: Security Sector Reform  
TDO: Training Development Officer  
UCC: Ukrainian Canadian Congress  
UN: United Nations  
USNORTHCOM: United States Northern Command

## Introduction

Canada is a determined supporter of Ukraine in its war against Russia. Canada was the first country to recognize Ukrainian independence in 1991. In 2004, Canada supported the pro-democracy Orange Revolution, and in 2008 supported Ukraine's Membership Action Plan approved at the North Atlantic Treaty Organization (NATO) Bucharest Summit. Canada supported the Euromaiden of 2013 and condemned Russia's annexation of Crimea and invasion of the Donbas. Responding to the 2014 Russian invasion of Ukraine, in 2015 Canada became directly involved in the war in Ukraine sending military advisors on Operation (Op) UNIFIER to train security the forces of Ukraine (SFU). These advisors remained in country until the weeks leading up to the February 24, 2022 invasion of Ukraine by Russian forces when they were repositioned to Poland and subsequently withdrawn to Canada until the tactical situation permits a return to training activities. On March 9, 2022, as the Russian invasion of Ukraine entered its third week NATO Secretary General Jan Stoltenberg, speaking to the Conference of Defence Associates Institute's Ottawa Conference, praised Canada's contribution to Ukrainian security and stability:

For many years, you have helped to strengthen the Ukrainian armed forces and institutions, including with training for tens of thousands of Ukrainian troops – many of whom are on the front lines today. You have also provided Ukraine with hundreds of millions of dollars of support and essential equipment. We are all inspired by the way in which the Ukrainian forces are bravely resisting the Russian invasion; and Canada's support has helped to make this possible.<sup>1</sup>

Canada's engagement in Ukraine through security force capacity building (SFCB) was an inexpensive yet impactful foreign policy approach to countering increasing Russian aggression in Eastern Europe. Canadian boots on the ground in Ukraine were the physical manifestation of Canadian relevance in Europe in the face of Russian aggression. Canada's training mission in Ukraine over the last seven years has been recognized by NATO allies to be a substantial commitment.

When Russia invaded Ukraine in February 2022 the country was in the process of continuing its transition towards Euro-Atlantic integration. The country was attempting to carve out a new European identity following centuries of Russian domination spanning from the days of Catherine the Great, through the decades of the USSR to Ukraine's post-Cold War independence and subjugation to Moscow influenced by a series of corrupt Moscow-aligned politicians and oligarchs. Canada's SFCB in Ukraine was an important part of Ukraine's goal to join NATO and the European Union (EU). Canada aimed to support Ukraine's interoperability with NATO in the short term and integration into NATO as a full member in accordance with Ukraine's Membership Action Plan through the mentoring and professionalizing of Ukrainian security forces in the longer term. Canada's foreign policy commitments are subject to a limited defence budget. At roughly \$13 million CAD per rotation of 200-250 soldiers, Canada's contribution was heavy on political impact but light on budgetary impact.

Canada's mission was part of a larger Euro-Atlantic response to Russia's military adventurism starting with the Georgian War in 2008 and the annexation of Crimea and invasion of the Donbas in 2014. With centuries of history and cultural influence in Ukraine and combat power concentrated at Ukrainian borders, the Kremlin was well positioned to orchestrate the eight years of violence in the Donbas prior to the invasion of 2022. Russia had positioned over 100,000 troops along Ukraine's border and in Crimea and controlled the thousands of separatists in the Donbas. Finally in February 2022, Russia made the ultimate demonstration of its intentions toward Ukraine by invading the country. Ukraine since 2013 has

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<sup>1</sup> NATO. "NATO Secretary General Welcomes Canada's Leading Role in the Response to Russia's Invasion of Ukraine." NATO, March 9, 2022. [https://www.nato.int/cps/en/natohq/news\\_193057.htm](https://www.nato.int/cps/en/natohq/news_193057.htm).



been trying to join the EU and NATO. The EU will decide on EU membership; NATO will decide on NATO membership; but Russia will decide the fate of Ukraine. It is important therefore to appreciate the background to Russia's invasion of Ukraine and address some of the motives behind Russia's military adventurism in Ukraine. This thesis explains how there came to be an ongoing war in Ukraine and analyzes Russia's major motivations for that war to better understand Ukraine's current security dilemma and why Canada is involved.

Despite the size and reach of her forces and influence, Russia has a relatively small economy and little real influence on an international scale beyond the immediate region, the "near abroad." Speaking at the 89th Ottawa Conference on Security & Defence, former Prime Minister Stephen Harper described Russia as "a hacker, a disruptor and a mercenary" arguing, Russia "really doesn't do much in terms of shaping the world in a positive sense."<sup>2</sup> So why did Canada respond so strongly to the Russian incursion into Ukraine in 2014? Was Canada threatened by Russian aggression in Ukraine, or did Canada deploy troops to prove its commitment to assume its share of NATO's collective burden without increasing spending to the Alliance's target levels?

## **Hypothesis**

Canada's response to Russia has been particularly strong relative to its stature in geopolitics. Canada's Op UNIFIER was a low-risk option to contribute to countering an encroaching threat in a politically and economically safe way. Canada as a founding member of NATO is committed to collective defence and operations advancing NATO strategic goals, such as countering Russian aggression. However, Canada is not committed to meeting the defence spending targets to achieve such an effect. The NATO expenditure guideline, though, is only one of many metrics to gage a country's commitment to collective defence. This thesis argues that Canada deployed advisors on Op UNIFIER to achieve its strategic objectives and international commitments in a cost-effective way with no guarantees of increasing spending to NATO guidelines. Canada hoped to convince its allies that defence capacity and deploy-ability (readiness) matter more than dollars and cents. Canada's SFCB has been a demonstration of commitment to NATO and allies on a budget.

Canada's contribution to NATO should not be judged by either the absolute level of defence expenditures or defence spending as a percentage of GDP. Canada has spent seven years dedicated to advancing NATO interoperability in Ukraine. As is now clear from Budget 2022, Ottawa is not planning to measurably increase defence spending. It is true for most states but especially for small and middle NATO members such as Canada with restricted defence budgets, that a realistic defence strategy means "the prioritization of goals by assignment of resources."<sup>3</sup> The Canadian commitment to Op UNIFIER was a realistic choice for Canada. Not only did it carry significant political weight in the broader context of Euro-Atlantic collective defence, Canada's commitment contribution, though small relative to NATO's overall collective military power, was relatively significant to sustaining the immediate mission. As such, Ottawa's role in joining other allies in helping Ukraine maintain its sovereignty and security was an efficient and effective strategic use of scarce defence resources that served Canadian and allied interests very well.

## **Methodology**

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<sup>2</sup> Stephen Harper. "The Ottawa Conference." In *Keynote*. CDA Institute, 2021. <https://cdainstitute.ca/ottawa-conference-2021/>.

<sup>3</sup> Benjamin H. Friedman, "The Pentagon's bloat: Accounting tricks and self-interested politicians ensure that US military spending will remain immune from any real 'hard choices'," *The Boston Globe*, February 17, 2017. <http://www.bostonglobe.com/opinion/2015/02/17/ashton-carter-military-leaders-must-pivot-spending-priorities/wzlpUD9rI0z8I17yqqevM/story.html>

This research for this study employs the qualitative method. The research relies on government statements, secondary sources interpretive analysis, access to information requests and the authors own experience having been deployed on Op UNIFIER on rotation eleven as the Commander of the Non-Commissioned Officer (NCO) Development Group. Russian, Ukrainian, Donbas-separatist, and other international sources are also referenced throughout.

There are competing ideas of Canadian motivations to deploy forces to Ukraine. The neo-classical realist approach looks at Canada's engagement in Ukraine as opportunistic balancing external threat of Russia and the external pressure of NATO burden-sharing with internal political and economic pressures to do more abroad on a small defence budget. The liberal international approach sees Canada's mission in Ukraine with international partners to promote Canadian interests and values. The neo-continental approach sees Canada's mission in Ukraine as a demonstration of alignment with US foreign policy. The Atlanticism approach assesses Canada's mission in Ukraine as alignment to its strategic interests in Europe through NATO. The diaspora politics approach sees Canadian operations in Ukraine as being influenced by the large Ukrainian diaspora community in Canada. The expeditionary expediency approach views Canada's commitments to Ukraine as the most cost-effective option to show support for NATO and NATO partners without an increase in defence spending. These approaches to analyzing Canada's foreign policy are addressed in the thesis. The results of this thesis will have wider implications. A study of Canada's foreign policy in Ukraine reveals how Western middle and smaller powers seek to contribute to multilateral operations as participants in the global power competition, through relatively inexpensive methods. The research also demonstrates the utility of other metrics of contribution to collective defence rather than the absolute level of defence expenditures and the percentage of GDP that spending represents.

The first chapter presents the background to the conflict in Ukraine and the NATO and the Canadian response to the 2014 and 2022 invasions. The second chapter provides a review of relevant literature. The third chapter introduces competing perspectives on Canadian foreign policy and how they can explain Canada's mission in Ukraine. The neo-classical realist, liberal internationalist, neo-continentalist, diaspora politics and "expeditionary expediency" approaches are analyzed. The fourth chapter addresses burden-sharing and Canada's defence spending. Canada has chosen to invest in people and training while avoiding the possible domestic political damage associated with large increases in defense expenditures, particularly large capital expenditures. As a middle power with an unremarkable budget, Canada is aiming for economy of effort in its NATO collective defense deployments and training mission, saving money on capital expenditures by prioritizing spending on personnel and operations.

The fifth chapter examines how Canada responded to Russia's war in Ukraine and how Canadian efforts (civilian and military) have impacted collective defense and Ukraine's security apparatus. The indirect approach to subduing the Russian threat (training missions, sanctions, international aid) was advantageous to Canada because of its cost savings and because it fosters strategic regional partnership. Op REASSURANCE has played an important role as the forefront of Canada's military response to Russian aggression through NATO. Since 2014 it has served as Canada's NATO allied assurance in response to the invasion of the Donbas and seizure of Crimea. There is also a degree of tripwire deterrence achieved by this mission as Russia is assessed to be deterred from invading the Baltics in avoidance of destroying NATO forces there and causing a larger war against the USA. Op REASSURANCE is Canada's largest current military operation with 695 soldiers leading a NATO enhanced Forward Presence (eFP) Battle Group in Latvia, 140 aviators with 5 CF-188 Hornets fighter jets and 1 CP-140 Aurora patrol aircraft on NATO enhanced Air Policing, 500 sailors on 2 frigates participating in Standing NATO Maritime Groups, and another 100 soldiers deployed to Poland after the invasion of 2022 assisting Ukrainians fleeing violence. These numbers are due to increase as the War in Ukraine persists.

If Op REASSURANCE demonstrates a commitment to NATO collective defence, Op UNIFIER demonstrates a commitment to new security partnerships and the containment of Russia through security force capacity building. Canada's response to Russia is characteristic of a middle power who wishes to prove its commitment to the collective defense afforded by NATO and enjoy the international cooperation of the liberal order without increasing defense budgets to unsustainable levels. Chapter Five further examines the expeditionary expediency approach to foreign policy as it has been employed in Ukraine. Security Sector Reforms (SSR) undertaken by Joint Task Force – Ukraine are cheap and have a lasting impact on the Security Forces of Ukraine. Canada is supporting this fight through training because it hopes to maintain a strategic partnership in Eastern Europe with Ukraine, a western-aligned European military power, and make a significant contribution to NATO. The final chapter concludes the thesis tying together the main arguments that explain Canada's expeditionary approach to operations and suggests areas of further research required to gain more understanding of Canada's NATO burden sharing.

## Chapter 1. Russia's War Against Ukraine and The Canadian Response.

### **Euromaidan 2013**

Ukraine is a politically fractured country in a struggle to separate from its past and build a future. Simplifying the fighting in Ukraine as a Russian conquest and ignoring Ukraine's complicated political situation fails to fully appreciate how Russia was able to exploit the political situation in Crimea and in the Donbas region of Eastern Ukraine. Some scholars divide Ukraine along linguistic and cultural lines pitting the European aligned, Ukrainian-speaking populations of the country's North and West against the Russian-influenced, Russophone populations of the South and East. This division is often simplified as an East-West or Russian-speaking vs Ukrainian-speaking divide. The reality in Ukraine is much more complicated as there are diverse pockets of linguistic minorities dispersed across the country, and there are more factors than language and ethnicity which influence neighbours to go to war with each other. Other factors include frustrations with widespread corruption and cronyism in Kyiv and a highly centralized federal government which gives little decision-making to the oblasts. Richard Sakwa organizes the complicated internal divisions of Ukraine's politics into two groups. There is "Orange" which "thinks in terms of a Ukraine that can finally fulfill its destiny as a nation state, officially monolingual, culturally autonomous from other Slavic nations and aligned with 'Europe' and the Atlantic security community". And there is "Blue... a rather more plural understanding of the challenges facing Ukraine, recognizing that the country's various regions have different historical and cultural experiences, and that the modern Ukrainian state needs to acknowledge this diversity in a more capacious constitutional settlement."<sup>4</sup>

Ukraine's South and East also contain significant Ukrainian-speaking ethnic Ukrainian populations and a significant Russian speaking population which both respect Ukrainian nationality despite being subjected to Russian cultural influence.<sup>5</sup> Some Russophone peoples who feel disenfranchised by a country abandoning its connection to the Russian World want to relive the historical memory of the grandeur and vast influence of the Russian Empire and the Soviet Union. The Verkhona Rada's, Ukraine's unicameral parliament, abandonment of the Russian language rights following the Euromaidan is an example of a trigger for those in the East and South who vote for Russian-aligned political leaders and did not support the Euromaidan.<sup>6</sup> Most supporters of a separate Donetsk and Luhansk are simply tired of the centralization in Kyiv. The reform-minded Euromaidan supporters fighting to drag themselves out of Moscow's orbit and toward Euro-Atlantic integration feel that there is no future in submission to Russia as a client state. The divide between those who believe in Moscow's ability to return the Russian world to hegemony and those who see Euro-Atlantic integration as the only way out of decades of corruption and economic despair has existed since independence yet reached a pinnacle in the Maidan Nezalezhnosti of 2013-2014.

Ukraine has been in political upheaval since the "Orange Revolution" of 2004. During that revolution the pro-Russian Party of Regions member, former Prime Minister of Ukraine and Governor of Donetsk oblast Viktor Yanukovich's fraudulent election win was overturned, and President Viktor Yushchenko was elected on the third round of voting after mass protests in the streets of Kyiv. Yushchenko's presidency was in turn characterized by a political crisis because of a rift between himself and Prime Minister Yuliya Tymoshenko over the official stance on the Russia-Georgia War of 2008. Yanukovich returned and defeated Timoshenko in the 2010 Ukrainian presidential elections and began

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<sup>4</sup> Richard Sakwa. "Frontline Ukraine: Crisis in the Borderlands." London: I.B. Tauris, 2015.

<sup>5</sup> Alexander Motyl and Brian Whitmore. "Interview: The Benefits of a Partitioned Ukraine." *Radio Free Europe / Radio Liberty*, February 20, 2014. <https://www.rferl.org/a/ukraine-split-partition-/25270988.html>.

<sup>6</sup> See Thomas De Waal. "New Fighting in Ukraine's Language War." *Carnegie Europe*, May 29, 2017. <https://carnegieeurope.eu/strategieurope/70098>.

forging closer ties with Russia plundering Ukraine with widespread corruption and cronyism.<sup>7</sup> Yanukovich abandoned the EU Association Agreement on November 21, 2013 which ignited the Euromaidan protest in Maidan Nezalezhnosti, the Independence Square in Kyiv, as protesters viewed the annulment of the agreement as a deliberate decision to reject the European Union in favour of alignment with Putin and Moscow.<sup>8</sup> The pro-Russian Berkut gendarmerie were deployed on November 30, 2013 injuring dozens of people in violent clashes against Euromaidan protesters.<sup>9</sup> The Berkut police forces were supported by Titushki thugs who were hired to beat up the Euromaidan protestors. Yanukovich's government cracked down with anti-protest legislation but killed the legislation and released all previously arrested activists to calm the unrest. Nevertheless, clashes between police and protestors intensified on February 18, 2014 claiming over a dozen lives. By February 20, 2014, 100 people had been killed by police, and on February 22, Yanukovich disappeared into Russia.<sup>10</sup> At this point, the Russian invasion of Crimea was already underway.<sup>11</sup>

## Annexation of Crimea

Russian soldiers had been in Ukrainian territory before the Maidan protests.<sup>12</sup> In accordance with the 2010 Kharkiv Accords pushed through the Verkhona Rada by pro-Russian Yanukovich, Russian forces were already positioned in Crimea prior to the annexation as part of a land-lease agreement. On orders from the Kremlin, Spetsnaz (Special Forces) and VDV (Russian Airborne Forces) left Russian bases in Sevastopol on February 22, 2014 heading for targets such as the Ukrainian military bases and government buildings. More units landed by airlift, by ferry and by landing ship. On February 27, 2014, Russian KSO (Special Operations Forces) disguised as a civilian militia stormed the government buildings of Simferopol and raised the Russian flag. All flags were removed from Russian uniforms and soldiers wore masks to conceal identity. The mystery soldiers were hailed by locals as the "polite men" or "little green men."<sup>13</sup> Donbas insurgent leader and former Federal Security Service (FSB) Colonel Igor Girkin recounts the "militia" pressuring Crimean authorities to vote for accession into Russia.<sup>14</sup> Although unrecognized by the international community, the all Crimean referendum saw 96% vote to join the Russian Federation on

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<sup>7</sup> See Taras Kuzio. "Russianization of Ukrainian National Security Policy Under Viktor Yanukovich." *The Journal of Slavic Military Studies* 25, no. 4 (2012): 558–81. <https://doi.org/10.1080/13518046.2012.730372>. and Serhii Kudelia. "The Maidan and Beyond: The House That Yanukovich Built." *Journal of Democracy* 25, no. 3 (2014): 19–34. <https://doi.org/10.1353/jod.2014.0039>.

<sup>8</sup> Yuriy Shveda and Joung Ho Park. "Ukraine's Revolution of Dignity: The Dynamics of Euromaidan." *Journal of Eurasian Studies* 7, no. 1 (2016): 85–91. <https://doi.org/10.1016/j.euras.2015.10.007>.

<sup>9</sup> See Lucie Steinzova and Kateryna Oliynyk. "The Sparks of Change: Ukraine's Euromaidan Protests." *Radio Free Europe / Radio Liberty*. Nov 21, 2018. <https://www.rferl.org/a/ukraine-politics-euromaidan-protests/29608541.html>. and "Ukraine Crisis: Timeline." *BBC News*. Nov 13, 2014. <https://www.bbc.com/news/world-middle-east-26248275>.

<sup>10</sup> See Mattathias Schwartz. "Who Killed the Kiev Protesters? A 3-D Model Holds the Clues." *New York Times Magazine*, May 30, 2018. <https://www.nytimes.com/2018/05/30/magazine/ukraine-protest-video.html>; and Gabriel Gatehouse. "The Untold Story of the Maidan Massacre." *BBC News*, Feb 12, 2015. <https://web.archive.org/web/20190326132752/https://www.bbc.com/news/magazine-31359021>.

<sup>11</sup> Gergana Noutcheva. "Whose Legitimacy? The EU and Russia in Contest for the Eastern Neighbourhood." *Democratization* 25, no. 2 (2018): 312–30. <https://doi.org/10.1080/13510347.2017.1363186>.

<sup>12</sup> Mikhail Pogrebinkskiy. "Russians in Ukraine: Before and After Euromaidan." *E-International Relations*, March 26, 2015. <https://www.e-ir.info/2015/03/26/russians-in-ukraine-before-and-after-euromaidan/>.

<sup>13</sup> Vitaly Shevchenko. "'Little Green Men' or 'Russian Invaders'?" *BBC News*, March 11, 2014. <https://www.bbc.com/news/world-europe-26532154>; Gogo Lidz, "'Polite People' of Russia: Not Who You Might Expect," *Newsweek*, April 11, 2015. <https://www.newsweek.com/polite-people-russia-321759>; and Shaun Walker and Harriet Salem. "Russian Parliament Approves Troop Deployment in Ukraine." *The Guardian*, March 1, 2014. <https://www.theguardian.com/world/2014/mar/02/russia-parliament-approves-military-ukraine-vladimir-putin>.

<sup>14</sup> Crimea Realities. "Girkin: 'Militia' Pressured Crimean Deputies into the Auditorium for Voting [Гиркин: «Ополченцы» стоняли крымских депутатов в зал для голосования]." *Crimea Realities*, Jan 24, 2015. <https://ru.krymr.com/a/26811484.html>. and Alexander Mercouris. "Insight and Limitations of Russia's Most Popular Military Hero (Igor Strelkov)." *Russia Insider*, February 7, 2015. <https://russia-insider.com/en/2015/02/06/3221>

March 6, 2014.<sup>15</sup> On March 18, Crimea was admitted into the Russian Federation.<sup>16</sup> President Vladimir Putin lamented the “divided Russian people” and promised to protect the Russian diaspora, and in March 2014, Putin reunited the “divided” Russians in Crimea by annexing the Crimean Peninsula.<sup>17</sup> Russian units blockaded Ukraine’s Crimean naval fleet, cut off Crimea from Ukrainian telecommunications and formed a militia made up of Registered Cossacks of the Russian Federation and former Berkut.<sup>18</sup> Russia’s military efforts in Crimea were preceded and accompanied by a robust misinformation campaign undermining the Ukrainian government. The information campaign included claims that pro-European Ukrainians have ties to Nazi ideology and that the US and NATO were controlling Ukraine with an aim to contain Russia, claims of danger to ethnic Russians in Ukraine, calls for Crimea to return to Russia, and claims that the 1954 transfer of Crimea to Ukraine was simply a Soviet-era mistake.<sup>19</sup>

The bloodless annexation of Crimea was a perfect storm which could not be recreated in 2022.<sup>20</sup> Crimea has a majority ethnic Russian population who were politically disenfranchised by their increasingly anti-Russian federal government. The peninsula was also home to Russia’s Black Sea Fleet with thousands of service personnel stationed near the Verkhona Rada of the Autonomous Republic of Crimea in Simferopol. The Annexation of Crimea was bloodless due in part to the very favourable political conditions prefacing the take over and to the Russian *Maskirovka* or deception in the form of the “little green men”. Most Crimea-based Ukrainian security forces defected to the Russian forces to stay with their families. The Russian annexation of Crimea was the “first formal act of annexation following the use and threat of force against a state in Europe since 1945.”<sup>21</sup> To bypass this obvious legal obstacle, Russia mounted an elaborate legal defense citing Kosovo’s independence as a precedent and arguing that Russia has a Responsibility to Protect (R2P) the large Russian populations in Ukraine.<sup>22</sup>

## 2014 Invasion of the Donbas

The Euromaidan was a turning point for pro-European Ukrainians in the West. In the East, in combination with the February 23, 2014 repeal of Russian language official status, the Euromaidan prompted the beginning of anti-Maidan protests and the rise of the Donetsk and Luhansk People’s

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<sup>15</sup> Resolution of the Verkhona Rada of the Autonomous Republic of Crimea No. 1702-6/14, On Holding of the All-Crimean Referendum (Mar. 6, 2014). and Thomas D. Grant. “Annexation of Crimea.” *American Journal of International Law* 109, no. 1 (2015): 68–95. doi:10.5305/amerjintlaw.109.1.0068.

<sup>16</sup> Kremlin. “Laws on Admitting Crimea and Sevastopol to the Russian Federation.” President of Russia, March 21, 2014. <http://en.kremlin.ru/acts/news/20625>.

<sup>17</sup> Igor Zevelev. “The Russian World Boundaries.” *Russia In Global Affairs*, no. 2, (April-June 2014), <https://eng.globalaffairs.ru/articles/the-russian-world-boundaries/>. and Transcript: Putin Says Russia Will Protect the Rights of Russians Abroad,” *Washington Post*, March 18, 2014, [https://www.washingtonpost.com/world/transcript-putin-says-russia-will-protect-the-rights-of-russians-abroad/2014/03/18/432a1e60-ae99-11e3-a49e-76adc9210f19\\_story.html](https://www.washingtonpost.com/world/transcript-putin-says-russia-will-protect-the-rights-of-russians-abroad/2014/03/18/432a1e60-ae99-11e3-a49e-76adc9210f19_story.html).

<sup>18</sup> Shane Harris. “Hack Attack.” *Foreign Policy*. March 3, 2014. and Roger N. McDermott. “*Brothers Disunited: Russia’s Use of Military Power in Ukraine*.” In *The Return of the Cold War, 1st ed.*, 77–107. Routledge, 2016. <https://doi.org/10.4324/9781315684567-5>.

<sup>19</sup> See Stephen Ennis. “Putin’s RIA Novosti Revamp Prompts Propaganda Fears,” *BBC Monitoring*, December 9, 2013. <https://www.bbc.co.uk/news/world-europe-25309139>. and “Mironov: Russia Must Protect Russians in Crimea,” *Russia 24*, February 26, 2014. <https://www.youtube.com/watch?v=TINvIbebHrs>. and “Ramzan Kadyrov: Russia Will Not Give Ukraine into the Hands of the Bandits [Рамзан Кадыров: Россия не позволит отдать Украину в руки бандитам],” *LifeNews*, Feb 26, 2014. <https://life.ru/p/128000>

<sup>20</sup> See Michael Kofman, et al. “Lessons from Russia’s Ops in Crimea and Eastern Ukraine.” *RAND Corporation*, May 9, 2017, [https://www.rand.org/pubs/research\\_reports/RR1498.html](https://www.rand.org/pubs/research_reports/RR1498.html).

<sup>21</sup> Thomas Grant. “Aggression Against Ukraine: Territory, Responsibility, And International Law.” New York: Palgrave Macmillan, 2015: Vii–Viii.

<sup>22</sup> Roy Allison. “Russian ‘Deniable’ Intervention in Ukraine: How and Why Russia Broke the Rules.” *International Affairs* (London) 90, no. 6 (2014): 1255–97. <https://doi.org/10.1111/1468-2346.12170>. and Thomas Ambrosio. “The Rhetoric of Irredentism: The Russian Federation’s Perception Management Campaign and the Annexation of Crimea.” *Small Wars & Insurgencies* 27, no. 3 (2016): 467–90. <https://doi.org/10.1080/09592318.2016.1151653>.

Republics in the Donbas region. Most voters in the Donbas voted for the ousted Viktor Yanukovich and spoke Russian at home. Unlike Crimea, the eruption of the Donbas separatism required little external influence as most anti-Maidan activists were disenfranchised by the pre-existing divisions in Ukrainian politics. Protesters seized government buildings in Donetsk and Kharkiv on March 1, 2014 while Russia was busy with its operations in Crimea. The Donetsk Peoples' Republic (DNR) was declared on April 7, 2014 and the Luhansk Peoples' Republic (LNR) declared shortly thereafter. Separatist military actions, although loosely coordinated by DNR Defence Minister Igor Girkin, began with local elites forming individual units. The rise of *Novorossiya* (New Russia) movement legitimized separatist violence in support of the historical Russian empire borders which included the South and East of Ukraine.<sup>23</sup> The separatist forces of the Donetsk and Luhansk typically refer to themselves jointly as the "Armed Forces of Novorossiya".

The Land Forces of the Armed Forces of Ukraine and the National Guard of Ukraine began military efforts against the separatists on April 13, 2014. The Ukrainian government forces were largely ineffective as they were small, poorly equipped, and unmotivated after a decade of pro-Russian politicians neglecting the security forces and due to the fact, that many Russophone members were unwilling to fight against fellow Russophones.<sup>24</sup> As fighting broke out in Mariupol, Donetsk, Kramatorsk and Sloviansk, Russia supplied separatist forces with air defence and armoured fighting vehicles. Russian-backed separatists used a Russian Buk surface-to-air missile to shoot down a civilian Malaysia Airline flight MH 17 on July 17, 2014 killing all 298 occupants and drawing the world's attention to the fighting in Ukraine's East.<sup>25</sup> The first Battle of Donetsk Airport on May 26, 2014 marked the beginning of a significant increase in Russian support for separatists in terms of materiel and personnel. With the separatist military position seeming helpless in August 2014, Russia bolstered their ranks with regular forces (flags removed) defeating Ukrainian security forces at the Battle of Ilovaisk.<sup>26</sup>

The results of the Battle of Ilovaisk influenced the first Minsk ceasefire negotiations in September 2014. The Minsk Protocol was drafted by the Trilateral Contact Group on Ukraine made up of parties from Ukraine, Russia and the Organization for Security and Cooperation in Europe (OSCE). It was mediated under the Normandy Format whose participants included Germany, France, Ukraine, and Russia in order to reach a ceasefire. An agreement was signed in Minsk, Belarus on September 5, 2014. However, Russian-backed separatists launched another offensive in January 2015 defeating the Ukrainian security forces at Debaltseve leading to a second Minsk ceasefire on February 12, 2015 which significantly reduced but did not eliminate fighting. In these negotiations, Putin pushed for the federalization of Ukraine which could lead to Donetsk and Luhansk oblasts "voting" to join the Russian Federation. The conflict was frozen from February 2015 until 2021 due to a "flawed implementation of the Minsk Agreements."<sup>27</sup> Tensions flared again in April 2021 with an increase in violence in the Donbas

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<sup>23</sup> John O'Loughlin, Gerard Toal, and Vladimir Kolosov, "The Rise and Fall of 'Novorossiya': Examining Support for a Separatist Geopolitical Imaginary in Southeast Ukraine," *Post-Soviet Affairs*, 2016.

<sup>24</sup> See Jeanne Whalen and Alan Cullison, "Ukraine Battles to Rebuild a Depleted Military." *Wall Street Journal*, March 25, 2014. <https://www.wsj.com/articles/SB10001424052702303949704579457591983371478>; Linda Kinstler, "Why Is Ukraine's Army So Appallingly Bad?" *New Republic*, May 9, 2014. <https://newrepublic.com/article/117710/ukraines-army-small-sovietized-underfunded-and-poorly-trained>; "Mathios: GPU has lists of 8,000 military and law enforcement officers who sided with the separatists." *Radio Svoboda*, August 14, 2015. <https://www.radiosvoboda.org/a/news/27187457.html>.

<sup>25</sup> Bellingcat Investigation Team. "Identifying the Separatists Linked to the Downing of MH17." *Bellingcat*, June 19, 2019. <https://www.bellingcat.com/news/uk-and-europe/2019/06/19/identifying-the-separatists-linked-to-the-downing-of-mh17/>.

<sup>26</sup> "Serving Russian Soldiers on Leave Fighting Ukrainian Troops Alongside Rebels, Pro-Russian Separatist Leader Says." *Telegraph*, August 28, 2014. <https://www.telegraph.co.uk/news/worldnews/europe/germany/angela-merkel/11060559/Serving-Russian-soldiers-on-leave-fighting-Ukrainian-troops-alongside-rebels-pro-Russian-separatist-leader-says.html>.

<sup>27</sup> Cindy Wittke, "The Minsk Agreements – More than 'Scraps of Paper'?" *East European Politics* 35, no. 3 (June 2019): 264–90, <https://doi.org/10.1080/21599165.2019.1635885>.

and Russia's positioning of around 100,000 soldiers at the Ukrainian borders. In April 2021 President Volodymyr Zelensky called for the US, Canada, and UK to join the Normandy Format negotiations of the Minsk Protocols to dominate Russia at the discussion table, but Russia would not meet under this pretext.<sup>28</sup>

There exists significant irrefutable evidence of Russian regular forces training and fighting in the Donbas region prior to the February 2022 invasion.<sup>29</sup> Although Russia denied deploying the military in support of the Russian backed separatist groups in the Donbas, it became clear that the Russian military was directly engaged at Donetsk airport in September 2014 and Debaltseve in February 2015.<sup>30</sup> Putin may have forgone the strife in the Donbas region, rather he supported separatist movements in the Donbas to prove that Russia decides Ukraine's survival.<sup>31</sup> Despite the many coordinated hybrid warfighting effects which Russia has employed to destabilize Ukraine, it is difficult to say to what degree Russia was controlling the situation in Ukraine's East. The Donbas has a complex web of separatist factions with fighters coming from all manner of Eurasian conflict regions (Transnistria, Abkhazia, South Ossetia, Chechnya) supplied by both the Russian state and billionaire oligarchs. Oligarchs in Ukraine fought to control key industries in the economy using political parties and politicians in a corrupt system of patronage. Powerful oligarchs lost their patronage over the Ukrainian Party of Regions during the Euromaidan which catered to Russian interests and cronies. Billionaire Konstantin Malofeev and other oligarchs are well known to fund separatist actions to return to this status quo.<sup>32</sup> These oligarchs were influenced themselves by Moscow giving the Russian state a degree of separation between the money and the separatists. Russia's most influential media and energy oligarchs profited from Ukraine's demand for Russian exports. Ukraine imported \$16.8 billions of Russian goods in 2014.<sup>33</sup> This demonstrated a reliance on Russia's larger economy and regional influence. Russia was also able to capitalize on Ukraine's corruption and oligarchy. Russia had a window of opportunity with the political turmoil arising from the Euromaidan protests and timed its actions accordingly.

## The 2022 Russian Invasion of Ukraine

Starting in March 2021, Vladimir Putin began positioning forces in Belarus, Crimea and in Russia's West bordering Ukraine. The Western international community denounced these movements as provocations and preparations for invasion which the Kremlin vigorously denied. The Kremlin responded

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<sup>28</sup> Ben Hall. "Ukrainian leader calls for revamp of peace process to end Donbas war." *Financial Times*, April 26, 2021. <https://www.ft.com/content/ed40d675-16b3-4a35-a157-b9bf0078b507>. and Ben Hall and Roman Olearchyk. "Zelensky forced to 'face reality' over peace talks with Russia." *Financial Times*, May 3, 2021. <https://www.ft.com/content/b8e7489d-bfa9-4a1f-aa1e-ba441bb0d354?segmentId=114a04fe-353d-37db-f705-204c9a0a157b>.

<sup>29</sup> See "Ukraine Crisis: Russian Troops Crossed Border, NATO Says." *BBC News*, Nov 12, 2014. <https://www.bbc.com/news/world-europe-30025138>. Aleksey Vinogradov, "What We Know About Russian Troops in Eastern Ukraine." *Euromaidan Press*, May 21, 2018. <http://euromaidanpress.com/2018/05/22/what-we-know-about-russian-troops-in-eastern-ukraine/>. and Simon Ostrovsky. "Russia Denies that Its Soldiers Are in Ukraine, But We Tracked One There Using His Selfies." *Vice*, June 16, 2015. [https://news.vice.com/en\\_us/article/ev9dbz/russia-denies-that-its-soldiers-are-in-ukraine-but-we-tracked-one-there-using-his-selfies](https://news.vice.com/en_us/article/ev9dbz/russia-denies-that-its-soldiers-are-in-ukraine-but-we-tracked-one-there-using-his-selfies). and Bellingcat Investigation Team. "Bellingcat Investigation - Russia's Path(s) to War." *Bellingcat*, Sep 21, 2015. <https://www.bellingcat.com/news/uk-and-europe/2015/09/21/bellingcat-investigation-russias-paths-to-war/>.

<sup>30</sup> International Crisis Group. "Eastern Ukraine: A Dangerous Winter." *Europe Report*, 235 (2014). <https://d2071andvip0wj.cloudfront.net/eastern-ukraine-a-dangerous-winter.pdf>. and International Crisis Group. "The Ukraine Crisis: Risks of Renewed Military Conflict After Minsk II." *Crisis Group Europe Briefing*, 73 (2015). <https://d2071andvip0wj.cloudfront.net/b73-the-ukraine-crisis-risks-of-renewed-military-conflict-after-minsk-ii.pdf>.

<sup>31</sup> Lilia Shevtsova. "The Russia Factor." *Journal of Democracy* 25, no. 3 (2014): 74–82. <https://doi.org/10.1353/jod.2014.0038>.

<sup>32</sup> Oleg Shynkarenko. "Who's Funding East Ukraine Militancy?" *Institute for War and Peace Reporting*, May 16, 2014. <https://iwpr.net/global-voices/whos-funding-east-ukraine-militancy>.

<sup>33</sup> Russian Federal State Statistics Service, "External Trade of The Russian Federation" and "Exports and Imports of The Russian Federation with Selected Foreign Countries." *Russia In Figures 2015*. [https://rosstat.gov.ru/free\\_doc/doc\\_2015/rusfig/rus-15e.pdf](https://rosstat.gov.ru/free_doc/doc_2015/rusfig/rus-15e.pdf)



to Western accusations of invasion preparation suggesting that they were exercising their forces within their borders in accordance with military norms. However, after a year of denying build ups of Russian invasion forces along the border of Ukraine on February 24, 2022 Russian tanks crossed into Ukraine. As the invasion commenced, Vladimir Putin made a national address announcing a “special military operation” to “de-nazify” and “demilitarize” Ukraine and “liberate” the “oppressed” Ukrainian people. The Russian invasion consisted of simultaneous air assault, airborne and special operations hitting airfields, ammunition depots and other military targets while armour columns deployed down main high-speed routes in small tank teams. There were three main axes of advance, from the North toward Kyiv, Sumy and Kharkiv from Belarus and Bryansk, Belgorod, and Kursk oblasts of Russia; from the East through the Donbas from Voronezh and Rostov oblasts; and from the South toward Mykolaiv and Mariupol from Crimea. Curiously, there seemed to be missing rear echelon supplies and vehicles and little coordination as the assaulting forces ran out of fuel and were bogged down in traffic jams as hundreds of combat vehicles packed the high-speed routes toward Kyiv.

As the assault met stiff resistance from Ukrainian security forces and civilian resistance groups and began to lose momentum, Russian forces began indiscriminate rocket attacks and bombings on civilian targets destroying hospitals, schools, civilian bomb shelters and other non-combatant targets as an effort to terrorize the general population into submission. Attempts have been made to negotiate a cease-fire, but Russian demands have been too steep, demanding federalization and strategic neutrality to be written into the constitution and that Ukraine recognizes Crimea’s ascension into the Russian Federation and autonomy for the self-declared people’s republics of Donetsk and Luhansk. Russian combat losses have been high, and the economy under pressure from sanctions. In desperation, Putin has reiterated nuclear-level threats if resistance persists. The Kremlin has also been forced to re-evaluate their war aims and have appear to have settled for consolidating gains in the Donbas rather than the original goal to take Kyiv. As the conflict entered a bloody stalemate in the late spring of 2022, destruction of Ukrainian cities and infrastructure continued, and Moscow appears to be creeping further away from its declared aim of becoming the liberator of the brotherly Ukrainian peoples instead entrenching itself in the Ukrainian conscience as its genocidal occupier. Following Ukrainian success in the counter-offensives of September 2022 in which thousands of square kilometres had been retaken, Vladimir Putin reached back to the old playbook from Crimea in desperation to claim a victory despite his army’s failures. In late September, illegitimate, manipulated independence referenda were held in Kherson, Zaporizhzhia, Donetsk and Luhansk and on September 30, 2022 Putin announced that these oblasts will be annexed into the Russian Federation despite not having not gain full control of the territories from Ukrainian security forces.

Tensions between NATO and Russia have reached dangerous levels following Russia’s invasion. Western governments and private businesses alike have moved toward cutting Russia out of the global market. Led by the United States, NATO member countries have increased humanitarian aid and supplies of weapons and ammunition. Even allies traditionally committed to policies of non-intervention with weapon supplies such as Germany have reversed decades old policies overnight. Russian ground manoeuvre operations have stalled, and Chinese alignment is not as strong as expected as China moves to provide humanitarian aid to Ukraine and has not supported Russia at the UN level in a way Russia may have counted on.<sup>34</sup> China’s first aircraft carrier was purchased from Ukraine and had promised in 2013 to defend Ukraine from nuclear attack. This history may complicate Xi Jinping’s support for Vladimir Putin. However, these agreements were made during Poroshenko’s pro-Russian regime.

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<sup>34</sup> “China says it will offer 10 million yuan more of humanitarian aid to Ukraine,” Reuters, March 21, 2022, <https://www.reuters.com/world/china/china-says-it-will-offer-10-mln-yuan-more-humanitarian-aid-ukraine-2022-03-21/>

Russia also managed to overhaul and reunite European Union and NATO defence in days with strong commitments to defensive deployments to the Eastern allies, budget increases and weapons shipments to Ukraine coming from across Europe. Russian nuclear brinkmanship has ratcheted tensions and isolated itself from allies. Putin's nuclear rhetoric is a step back from recent nuclear arms control talks. This may also be a sign of weakness as the President understands he cannot win Ukraine which is receiving massive Western support and must make ominous threats to deter any further increase in such support. As Ukraine's counter-offensive of Fall 2022 saw continuing success in pushing back Russian lines in Ukraine's South and East, President Putin was forced to announce a partial mobilization on September 21 calling up hundreds of thousands more men (the exact figure is classified) to bolster his ranks (with Russia's ethnic minorities disproportionately represented in the draft). And on September 30, 2022, Putin announced the annexation of Kherson, Zaporizhzhia, Donetsk and Luhansk oblasts despite not fully controlling these Ukrainian territories and while actively losing more ground every day. This annexation announcement was accompanied with even further implications of nuclear war with the West. Invasion aside, Russia's calls for Ukraine to recognize the independence of Donetsk and Luhansk peoples' republics and acknowledge Crimea's annexation into the Russian Federation, will fuel even further anti-Russian sentiment in Ukraine after Russia physically takes the lands populated by majority Russian population out of the Ukrainian polity.

### **Russia's Fight in Ukraine**

Russia is undeniably the primary aggressor in the war in Ukraine, and there are many competing explanations for Russia's involvement. Ultimately, Canada's mission in Ukraine was to deter Russian aggression and prove to allies that Canada will deploy and accept risk to that end. A thorough explanation of Russia's motives for invading the Donbas is beyond the scope of this thesis, but an introduction to some of the major perspectives explaining Russian military adventurism in Ukraine is necessary to understand Canada's mission there.

Elias Götz explains Russia's military aggression in 2014 and after using four categories. For the first category, Götz uses "Decision-Maker Explanations" to describe the emphasis on the role that President Putin personally has played in the conflict.<sup>35</sup> The second category, "Domestic Political Explanations", describes the Russian government's attempt to divert the attention of the Russian people away from domestic issues such as a stagnating economy and prevent the spread of pro-democracy popular protests similar to the Euromaidan in Russia and stifle opposition parties such as Alexei Navalny's Russia of the Future party.<sup>36</sup> The third category, "Ideational Explanations", describes the constructivist explanations of Russia's foreign policy such as the cultural and linguistic factors of Russia's "near abroad" which propel Russia to protect its sphere of influence from shrinking. The fourth category "Geopolitical Explanations" describes the "the combination of rising material capabilities and strategic threats [which] pushed Russia to assert its regional dominance."<sup>37</sup> These four categories provide a sound summary of the complex explanations for Russia's intervention. The ontological security environment argument looks at Russia's military adventurism in Ukraine as a struggle to maintain a sense of self which is tied to Russia's ability to influence Ukraine and other post-soviet spaces such as Belarus and Georgia.<sup>38</sup> In this thesis, Russia's military adventurism in Ukraine is described through its pursuit of great-power status by maintaining regional influence, its fear of NATO encroachment and through the ontological security-seeking explanation, describing Russia's actions as motivated by its determination to maintain its sense of meaning and purpose in the world order.

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<sup>35</sup> Elias Götz, "Putin, the State, and War: The Causes of Russia's Near Abroad Assertion Revisited," *International Studies Review* 19, no. 2 (June 2016): 228–53, <https://doi.org/10.1093/isr/viw009>.

<sup>36</sup> Ibid.

<sup>37</sup> Ibid.

<sup>38</sup> Jennifer Mitzen, "Ontological Security in World Politics: State Identity and the Security Dilemma." *European Journal of International Relations* 12, no. 3 (2006): 341–70. <https://doi.org/10.1177/1354066106067346>.

## Russia's Pursuit of Influence and Great Power Status

The Russian Federation does not match the Soviet Union's former influence and glory. Since the collapse of the USSR, Russia has been struggling to carve out its own area of influence exerting hard power in pursuit of regional hegemony.<sup>39</sup> Russia is increasingly resorting to military operations making up for its decline in soft power in Europe by projecting hard power in Ukraine.<sup>40</sup> The warning for Ukraine came with the 2008 Russian-Georgian war in which Georgia was invaded by Russian forces and Georgian South Ossetia came effectively under Russian control with Russian bases scattered across the Georgian territory. Following the "New Look" reforms of 2011, Russia has waged war with a new character, spreading its influence in former territories, especially Ukraine, through a hybrid approach to operations characterized by robust information operations, cyberwarfare, militias, and private military contractors. Russia's strategy in Ukraine has had several terms attached to it. Terms associated with Russia's operations in the Donbas prior to 2022 include: "hybrid warfare",<sup>41</sup> "liminal warfare",<sup>42</sup> "nonlinear warfare",<sup>43</sup> "new generation warfare",<sup>44</sup> "grey zone operations",<sup>45</sup> or the "Gerasimov doctrine".<sup>46</sup> Ukraine has a history of centuries of Russian influence and a sizable Russian minority concentrated in the East of the country near the Russian border. Russia has been able to take advantage of this foothold in Ukraine during its operations. True to Sun Tzu's "Art of War", the Russian war machine rolls once it assesses that the war is already won. Russian forces dubbed "the Little Green Men" or "the Polite Men" entered the Verkhona Rada of Crimea only after years of influence activities had guaranteed pro-Russian support and left the Security Forces of Ukraine unable to respond. Unfortunately for Russia, this was not repeated in 2022 following their full-scale conventional invasion.

Russia perceives itself as the foremost Eurasian power, the geographical centre of the world. Eurasionist philosopher and pro-Russian separatist fighter Aleksandr Dugin wrote that the "territory of contemporary Russia, earlier the Soviet Union (USSR), and still earlier the Russian Empire, is the Heartland; it is the land-based core of the entire Eurasian continent."<sup>47</sup> Ukraine's territory remains an important feature in Russia's strategic system of the physical defence of the Eurasian continent. This harkens back to the Soviet (and indeed Tzarist) days when Russia built a wall of aligned states to buffer against an invasion. Keir Giles argues that Moscow "equates depth of territory held with security gained" and that there exists a "permanent and persistent belief throughout history that Russia's land borders present a critical vulnerability and that to protect itself, Russia must exert control far beyond them."<sup>48</sup>

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<sup>39</sup> Samuel Charap and Keith Darden. "Russia and Ukraine." *Survival* (London) 56, no. 2 (2014): 7–14.

<https://doi.org/10.1080/00396338.2014.901726>; Keith B. Payne and John S. Foster. "Russian Strategy Expansion, Crisis and Conflict." *Comparative Strategy* 36, no. 1 (2017): 1–89. <https://doi.org/10.1080/01495933.2017.1277121>; and Mette Skak. "Russian Strategic Culture: The Role of Today's Chekisty." *Contemporary Politics* 22, no. 3 (2016): 324–41. <https://doi.org/10.1080/13569775.2016.1201317>.

<sup>40</sup> Adam Balcer. "In the Shadow of a Neo-Imperialist Russia." *New Eastern Europe*, no. 3-4(22) (2016): 29–35. <https://www.ceeol.com/search/article-detail?id=459421>; and Paul Goble. "Having Lost 'Soft' Power in Post-Soviet Space, Moscow Increasingly Using 'Hard'." The Jamestown Foundation, June 13, 2017, <https://jamestown.org/program/lost-soft-power-post-soviet-space-moscow-increasingly-using-hard/>.

<sup>41</sup> Amos C. Fox. "Russian Hybrid Warfare: A Framework." *Journal of Military Studies*, 2021. <https://doi.org/10.2478/jms-2021-0004>.

<sup>42</sup> David Kilcullen. *The Dragons and the Snakes: How the Rest Learned to Fight the West*. New York, NY: Oxford University Press, 2020. Page 125.

<sup>43</sup> Peter Pomerantsev. "How Putin Is Reinventing Warfare." *Foreign Policy*, May 6, 2014. <https://foreignpolicy.com/2014/05/05/how-putin-is-reinventing-warfare/>.

<sup>44</sup> Charles K. Bartles. "Recommendations for Intelligence Staffs Concerning Russians New Generation Warfare." *Military Intelligence Professional Bulletin* 43, no. 4 (2017): 10–17.

<sup>45</sup> Philip Kapusta. "The Gray Zone." US Special Ops Command, October 2015. <https://www.soc.mil/SWCS/SWmag/archive/SW2804/GrayZone.pdf>.

<sup>46</sup> Charles K. Bartles. "Getting Gerasimov Right." *Military Review* 96, no. 1 (2016): 30–.

<sup>47</sup> Alexander Dugin. "Last War of the World-Island: The Geopolitics of Contemporary Russia" (London: Arktos, 2015), 161.

<sup>48</sup> Keir Giles. *Moscow Rules: What Drives Russia to Confront the West*. Baltimore, Maryland: Project Muse, 2019, 26.

This explains the Russian expression “the only secure Russian border has Russian soldiers on both sides.” In both the geographic and geopolitical sense, Ukraine is a strategic buffer between the West and Russia. Serhii Plokhy refers to the steppe country as the “Gates of Europe” for this reason.<sup>49</sup> Ukraine is also valuable for its Black Sea and Azov Sea ports. Ukraine’s Black Sea ports of Odessa and Sevastopol have been highly sought after by the Russian Navy since the days of the Russian Empire. Controlling the Black Sea gives Russia’s Navy a launch pad into the Mediterranean and to the rest of the world’s Oceans from there. Russia also benefits from gas pipelines crossing Ukraine delivering gas to the European Union. Command of Ukrainian territory equates to access to European natural gas markets. These gas pipelines have resulted in confrontations with Ukraine multiple times since the 1990s.

Although there exists evidence of anti-war protests in major Russian city centres, there is also evidence of some degree of popular support for the invasion. The great Bolshevik revolutionary Vladimir Lenin used the term “the Great Russian chauvinism (Великорусский шовинизм)” to describe the phenomenon observed today wherein Moscow fights to dominate the “lesser” nations in its immediate periphery. Many Russians today seem supportive of the idea that their country should have influence over surrounding territories. Generations of Russian writers like Alexander Dugin and influencers such as hockey stars Alexander Ovechkin and Evgeni Malkin have publicly extolled Russian chauvinism and populist politics over the last twenty years. To say Vladimir Putin is the head of the snake may be true, but the West must not ignore the deeply imbedded network of Russian chauvinists who will pick up where Putin leaves off. This reality is likely to be exacerbated as the Russian people are cut off from global media infrastructure and are now force-fed Putin’s own concocted narrative. Putin’s *siloviki* or inner circle too is strengthened as the circle of trust shrinks.

### **The Threat of NATO Expansionism**

Ukraine has been on a confirmed path to join NATO since the 2008 NATO Bucharest Summit when it applied for a Membership Action Plan. NATO leaders confirmed that Ukraine would become a member of NATO at the June 2021 Brussels Summit supporting the decision made at the 2008 Bucharest Summit. With the possibility of Ukrainian membership in NATO, Russia believed it “faced a nightmare scenario of having a giant client state of outside powers on its doorstep.”<sup>50</sup> A realist interpretation of Russia’s actions in Ukraine views Russia acting in accordance with balance of threat theory.<sup>51</sup> Russia cries that it is threatened by an ever-enlarging NATO. University of Chicago political scientist John Mearsheimer supports this idea arguing that Russia’s aggression is in response to NATO encroachment.<sup>52</sup> Boston University Professor Andrew Bacevich is also critical of NATO and alliance member involvement in Ukraine. Ever since the 2004 accession of the Baltic States, NATO has advanced uncomfortably close to Russian borders as new members are added to the alliance. From the Russian perspective, NATO is a cold war enterprise and a threat to Russian strategic interest.<sup>53</sup> Putin holds tightly to the claim that former US President Bill Clinton promised former Russian President Boris Yeltsin that NATO would not recruit former Soviet republics. However, it is unconfirmed if this exchange ever occurred in the way that it is remembered in Moscow. Also threatening to Russia, is that NATO’s promotion of democratic values is in uncomfortable juxtaposition to President Putin’s twenty-year reign. NATO is described as an enduring threat in the *Voennaya Doktrina 2014*, the Russian strategic doctrine published in the Russian Gazette.

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<sup>49</sup> Serhii Plokhy. *The Gates of Europe: A History of Ukraine*. New York, NY: Basic Books, a member of the Perseus Books Group, 2015.

<sup>50</sup> Elias Götz. “Neorealism and Russia’s Ukraine Policy, 1991-Present.” *Contemporary Politics* 22, no. 3 (2016): 301–23. <https://doi.org/10.1080/13569775.2016.1201312>.

<sup>51</sup> Stephen M. Walt. *The Origins of Alliances*. Ithaca: Cornell University Press, 1987.

<sup>52</sup> John Mearsheimer. “Why The Ukraine Crisis Is the West’s Fault: The Liberal Delusions That Provoked Putin.” *Foreign Affairs* (New York, N.Y.) 93, No. 5 (2014): 77–89.

<sup>53</sup> Andrei P. Tsygankov. “The Russia-NATO Mistrust: Ethnophobia and The Double Expansion to Contain ‘The Russian Bear.’” *Communist And Post-Communist Studies* 46, No. 1 (2013): 186.

The Russian Federation takes advantage of NATO's growth excusing their own military adventurism as a response to an encroaching threat.<sup>54</sup>

Beyond the need to dominate neighbours, Russians feel that they have been deeply wronged by the West. The invasion of Ukraine is a righting of the historical wrong of the collapse of the USSR and the shrinking of Moscow's influence. Accusations of Russian genocide in Ukraine or assassination attempts on notable Russian figures are fabricated as an excuse to regain lost Russian influence and to appear as the oppressed. Russia, even before the sanctions regime, viewed itself as a victim of Western containment. Putin believes Russia was promised that NATO would not expand, and this promise was broken. Some experts advance a similar position arguing that efforts toward Ukrainian NATO membership directly provoked Russia to invasion. Russia believes itself to be a Eurasian great power with NATO as the natural enemy preventing Russia from occupying the position in the world for which it is due. The attack on Ukraine is an effort therefore to seize the initiative and take advantage of Washington's new indo-pacific focus and a perceived disunity in the Western alliance, sending a message to NATO that Russia maintains its sphere of influence and will consider NATO expansion a threat.

The idea that Russia invaded Ukraine to prevent it from joining NATO is flawed for several reasons. First, there had not been a new member added to the alliance for at least five years at the time of Russia's annexation of Crimea in 2014. There is no evidence of a new NATO member receiving permanent troops and weapons by NATO forces prior to 2014. Second, NATO forces currently operational in the enhanced Forward Presence, the NATO multinational battlegroups in Latvia, Lithuania, Estonia, Poland and Romania led by Canada, Germany, the UK, the US and France tasked with strengthening allied cooperation through combined exercises, are not strong enough to launch a ground invasion of Russia. Of all the new additions to NATO, none of them saw a build-up of NATO forces further toward Russia's borders before 2014. NATO's eFP has five battalion level multinational battle groups stretched across the Baltic States, Romania and Poland. There is no realistic scenario where these battle groups or the national armies of the Eastern NATO members would be able to block a Russian army sized invasion like the 58<sup>th</sup> Army's incursion into Georgia in 2008 or the 150,000 that invaded Ukraine in February 2022. Russia understands that they have a superior force to threat ratio in Eastern Europe compared to NATO because of the vast distances required to transport the majority of NATO's combat power to the East. Third, despite NATO pronouncements about possible membership and increasingly close military cooperation, Ukraine was quite far from joining NATO in 2014 and still is today. Ukraine does not have an approved membership action plan despite the will to join NATO and is unlikely to receive one until its issues with corruption and ethnocentric politics are resolved and the war is over with border disputes resolved. Fourth, although the Russian invasion and violence in the Donbas region in 2014 certainly complicated and delayed Ukrainian accession into NATO, the Russian violence has proven to strengthen the political support for NATO and brought Ukraine closer to joining NATO by speeding up reforms in response to the Russian threat.<sup>55</sup> After the unrecognized illegal annexation of Kherson, Zaporizhzhia, Donetsk and Luhansk, President Zelensky submitted an application to join NATO.

Ukraine abandoned its non-aligned status in December 2014, launched the Strategic Defence Bulletin in 2016 basing the military on NATO standards, passed a NATO integration law in 2017, and was named a NATO aspirant country in 2018 and an Enhanced Opportunity Partner in 2020. The US, Latvia, Lithuania, Canada, and the UK launched SFCB operations in Ukraine after Russia's invasions to

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<sup>54</sup> Voennaya Doktrina Rossiyskoy Federatsii. Rossiyskaya Gazeta – Federal Issue No. 298 (6570). (2014). <https://Rg.Ru/2014/12/30/Doktrina-Dok.Html>.

<sup>55</sup> Sergey Sukhankin, "Ukraine's Thorny Path to NATO Membership: Mission (Im)Possible?" International Centre for Defence and Security, April 22, 2019, <https://icds.ee/ukraines-stony-path-to-nato-membership-mission-impossible/>; and Kimberly Marten. "Putin's Choices: Explaining Russian Foreign Policy and Intervention in Ukraine." The Washington Quarterly 38, no. 2 (2015): 189–204. <https://doi.org/10.1080/0163660X.2015.1064717>.

prepare the security forces of Ukraine for interoperability with NATO furthering Ukraine on its long road to NATO membership. Presumably basing his predictions off the world's disregard for the 2008 invasion of Georgia, President Putin may have underestimated the global response to Russia's incursion into Ukrainian territory.<sup>56</sup> But whether it was a deliberately self-fulfilling prophecy or not, NATO and Ukraine's reaction to 2014 gave credence to Putin's arguments about Ukraine potentially joining NATO. Furthermore, seven years of NATO training in Ukraine prepared Ukrainian security forces for 2022 and contributed to military successes against Russia's ground forces in 2022.<sup>57</sup>

## Russia's Ontological Security

Ukraine and Russia share a complicated history dating back to their conjoint creation in the Kyivan' Rus over 1,000 years ago with the capital in Kyiv. Throughout much of Ukraine's history, the Russian Empire and then the Soviet Union controlled Ukrainian territory.<sup>58</sup> Russia derives its cultural identity from Ukrainian territories and cities such as the Donets River basin, Kyiv, Odessa and Kharkiv. In 2014, Henry Kissinger described the Russia's historical memory in Ukraine in the *Washington Post* writing:

The West must understand that, to Russia, Ukraine can never be just a foreign country. Russian history began in what was called Kievan-Rus. The Russian religion spread from there. Ukraine has been part of Russia for centuries, and their histories were intertwined before then. Some of the most important battles for Russian freedom, starting with the Battle of Poltava in 1709, were fought on Ukrainian soil.<sup>59</sup>

The 2012 Chatham House report on Russian influence activities in Ukraine notes that: "For Russia, maintaining influence over Ukraine is more than a foreign policy priority; it is an existential imperative. Many among Russia's political elite perceive Ukraine as part of their country's own identity."<sup>60</sup> The Soviets referred to Russia's need to influence the former Soviet bloc countries on its frontier as an "enlightened imperialism." Leonid Brezhnev's Soviet-era "limited sovereignty" doctrine can be observed as Russia attempts to subordinate Ukraine within their sphere of influence.<sup>61</sup>

The Donbas region of eastern Ukraine and Crimea contain large Russian-speaking populations, after centuries of Russification by Catherine the Great, the Russian Empire, and the Soviet Union. Russia

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<sup>56</sup> Marten, 8.

<sup>57</sup> Daniel Michaels. "The Secret of Ukraine's Military Success: Years of NATO Training." *The Wall Street Journal*, April 14, 2022. [https://www.wsj.com/articles/ukraine-military-success-years-of-nato-training-11649861339?st=v2qlv5o7qov5ek4&reflink=article\\_email\\_share](https://www.wsj.com/articles/ukraine-military-success-years-of-nato-training-11649861339?st=v2qlv5o7qov5ek4&reflink=article_email_share).

<sup>58</sup> See Andreas Kappeler, "Ukraine and Russia: Legacies of the Imperial Past and Competing Memories," *Journal of Eurasian Studies* 5, no. 2 (July 2014): 107–15, <https://doi.org/10.1016/j.euras.2014.05.005>, 112. and Anne Applebaum. "Why Does Putin Want to Control Ukraine? Ask Stalin." *Washington Post*, Oct. 20, 2017. [https://www.washingtonpost.com/outlook/why-does-putin-want-control-ukraine-ask-stalin/2017/10/20/800a7afe-b427-11e7-a908-a3470754bbb9\\_story.html](https://www.washingtonpost.com/outlook/why-does-putin-want-control-ukraine-ask-stalin/2017/10/20/800a7afe-b427-11e7-a908-a3470754bbb9_story.html).

<sup>59</sup> Henry Kissinger. "Henry Kissinger: To Settle the Ukraine Crisis, Start at The End." *The Washington Post*, March 5, 2014. [https://www.washingtonpost.com/opinions/henry-kissinger-to-settle-the-ukraine-crisis-start-at-the-end/2014/03/05/46dad868-A496-11e3-8466-D34c451760b9\\_Story.Html](https://www.washingtonpost.com/opinions/henry-kissinger-to-settle-the-ukraine-crisis-start-at-the-end/2014/03/05/46dad868-A496-11e3-8466-D34c451760b9_Story.Html).

<sup>60</sup> Alexander Bogomolov and Oleksandr Lytvynenko. "A Ghost in the Mirror: Russian Soft Power in Ukraine," Chatham House, Jan 2012. [https://www.researchgate.net/publication/263853878\\_A\\_Ghost\\_in\\_the\\_Mirror\\_Russian\\_Soft\\_Power\\_in\\_Ukraine\\_The\\_Aims\\_and\\_Means\\_of\\_Russian\\_Influence\\_Abroad\\_Series\\_A\\_Ghost\\_in\\_the\\_Mirror\\_Russian\\_Soft\\_Power\\_in\\_Ukraine](https://www.researchgate.net/publication/263853878_A_Ghost_in_the_Mirror_Russian_Soft_Power_in_Ukraine_The_Aims_and_Means_of_Russian_Influence_Abroad_Series_A_Ghost_in_the_Mirror_Russian_Soft_Power_in_Ukraine).

<sup>61</sup> Eugene Rumer. "Russian National Security and Foreign Policy in Transition," (Santa Monica, RAND, 1995): 21. [https://www.rand.org/pubs/monograph\\_reports/MR512.html](https://www.rand.org/pubs/monograph_reports/MR512.html); and "Barroso Tells Putin To Abandon Brezhnev Doctrine on Limited Sovereignty", In *Euractiv*, (14 May 2014). <https://www.euractiv.com/section/europe-s-east/news/barroso-tells-putin-to-abandon-brezhnev-doctrine-of-limited-sovereignty/>.

has benefited from having a local Russophone population in Ukraine susceptible to Russian information operations. Despite efforts by the Ukrainian government to increase the use of Ukrainian language in government and in the market, Russian language is prominent across Ukraine. Many Ukrainians speak Russian on a routine basis even though only a small portion of Ukraine's population identifying as ethnic Russian, this includes the family of Ukraine's current President Volodymyr Zelensky. Russian is unmistakably the lingua franca of Eurasia and the post-soviet space. There are also Russian Ukrainians (particularly in Crimea and in Donetsk and Luhansk oblasts) who feel a deep sense of connection and admiration to the Soviet days of power and to Moscow which has dominated the region for centuries.

This domestic conflict between Russian and Ukrainian identities predates President Putin's regime. Since the beginning of his time in power, President Putin has expressed his intent to expand Russian cultural influence, the *Russkiy Mir* (Русский мир or Russian World), and propel the Russian Federation onto the global stage as a multipolar power. *Russkiy Mir* is an olden concept ironically attributed to a medieval Ukrainian Prince Iziaslav I of Kyiv. The concept now refers to the language and culture of Russia, or what it means to be Russian. Included in President Putin's 2000 foreign policy concept are the objectives to "uphold in every possible way the rights and interests of Russian citizens and fellow countrymen abroad" and to "popularize the Russian language and culture of the peoples of Russia in foreign states."<sup>62</sup> President Putin established the *Russkiy Mir* Foundation in 2007 with the purpose of promoting Russian language and culture abroad, including in Ukraine.<sup>63</sup> Ukrainian Defense Minister Stepan Poltorak said in 2015 that President Putin wishes to "return" Ukraine to the *Russkiy Mir*.<sup>64</sup> Russia capitalized on the political mistakes of Ukraine's Verkhona Rada following the Euromaidan such as removing official status of Russian and took advantage of political instability.

The Russian Federation manipulates history and the shared experiences in Russian and Ukrainian history to fit its strategic aims. Russian information campaigns equate the Ukrainian national identity to Russian as an attempt to delegitimise Ukraine. The Ukrainian national identity is not respected as particularly distinct from Russian.<sup>65</sup> Ukrainian language is often referred to as a "dialect" and Ukraine's joining of the Russian Federation as "inevitable."<sup>66</sup> At the 2008 NATO summit in Bucharest Putin said to President George W. Bush "You don't understand, George, that Ukraine is not even a country."<sup>67</sup> President Putin is also on the record as having supported the idea that Ukraine and Russia will inevitably join as a one nation.<sup>68</sup> Ukrainian territory has hosted significant Russian cultural events, including religious, and the Russian Orthodox Church has contributed to the lack of political recognition for Ukraine. At present, Russian, and Ukrainian media are fighting a war of memories over Ukrainian identity and the legitimacy of Ukrainian nationalism. Serhii Plokhyy's history of Ukraine "The Gates of Europe" analyzes the shared experiences of Russia and Ukraine which Henry Kissinger referenced including common nationality during the Kyivan Rus', The Russian Empire and the USSR. However, Plokhyy argues that these shared experiences do not make the two nations one and the same. To demonstrate this, Plokhyy analyzes the failed "New Russia" projects in Kharkiv and Odessa running

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<sup>62</sup> Vladimir Putin. "The Foreign Policy Concept of The Russian Federation." (28 Jun 00).

<https://fas.org/nuke/guide/russia/doctrine/econcept.htm>.

<sup>63</sup> Russkiy Mir Foundation. "About Russkiy Mir Foundation." <https://russkiymir.ru/en/fund/index.php>.

<sup>64</sup> Uradoviy Kur'rl. "Putin Hopes for Ukraine's Return to The So-Called 'Russian World'". (05 Apr 18).

<https://nv.ua/Ukraine/Politics/Putin-Nadeetsja-Na-Vozvrashchenie-Ukrainy-V-Tak-Nazyvaemyj-Russkij-Mir-Poltorak-2462329.html>

<sup>65</sup> Roman Szporluk. "Belarus, Ukraine and the Russian Question: A Comment." In *Post-Soviet Affairs*, Vol. 9, No. 4 (1993): 366-374.

<sup>66</sup> Andreas Kappeler. "Ukraine and Russia: Legacies of the Imperial Past and Competing Memories." *Journal of Eurasian Studies* 5, no. 2 (2014): 107-15. <https://doi.org/10.1016/j.euras.2014.05.005>.

<sup>67</sup> James Marson. "Putin to the West: Hands Off Ukraine." *Time*, May 25, 2009. <http://content.time.com/time/world/article/0,8599,1900838,00.html>

<sup>68</sup> Kremlin. "Interview with Oliver Stone [Интервью Оливеру Стоуну]." President of Russia. June 19, 2019. <http://kremlin.ru/events/president/news/61057>.

parallel to the fighting in the Donbass. Russia tried to apply a similar strategy used successfully in Crimea (majority ethnic Russian) to pry the Russophone populations back into the Russkiy Mir. The Russian Federation conflated Russian speaking with Russian patriotism ignoring the fact that the population centres of Kharkiv, Odessa, Donetsk and Luhansk are majority Ukrainian despite speaking mostly Russian.<sup>69</sup>

### **NATO's Role in Containing Russian Advances**

The Russian Federation is currently viewed as a principal threat to American and NATO interests.<sup>70</sup> The Western world's alarm with Russia and the Russian-focused analysis of war in Ukraine is legitimate but also puts Western leaders at risk of drawing attention away from China and the Indo-pacific region. Russia's annexation of Crimea was a direct action that "undermined the European and international order, an order that [NATO] regarded itself as custodian. Russian Behaviour also held implications for NATO directly, for the security of its eastern members and thus for the credibility of NATO's core functions of deterrence and reassurance."<sup>71</sup> In response, NATO halted "all practical civilian and military cooperation" with Russia and launched assurance plans at sea, on land and in the air over the Baltics, and a Very High Readiness Joint Task Force was stood up.<sup>72</sup> By 2015, NATO had already conducted 280 exercises "dedicated to Assurance Measures in the Eastern part of NATO."<sup>73</sup>

In the Wales Summit Declaration in 2015, NATO officials pledged to "reverse the trend of declining defence budgets" and maintain a "military strategic posture."<sup>74</sup> It was at the Warsaw Summit of 2016 that NATO allies decided to deploy soldiers to Poland, Lithuania, Latvia, and Estonia to "unambiguously demonstrate, as part of our overall posture, Allies' solidarity, determination and ability to act by triggering an immediate Allied response to any aggression."<sup>75</sup> The eFP is part of the Readiness Action Plan decided at the Wales Summit of 2014 following Russia's Annexation of Crimea. The eFP cannot stop a Russian invasion, but it can provide a degree of deterrence and assurance to Eastern allies.<sup>76</sup> The Multinational Joint Commission (MJC) on Defense Reform and Security Cooperation and the Multinational Coordination Centre were founded in Kyiv to coordinate multiple bilateral efforts of NATO member countries developing the capacity of Ukrainian security forces. Without an official NATO mission in Ukraine, the MJC was the next best thing for multilateral cooperation. NATO liaison officers were in Kyiv for years and worked alongside the member countries running bilateral training missions in Ukraine. NATO members on bilateral missions in Ukraine worked together daily. From Moscow's perspective, the SFCB conducted in Ukraine was an American-led, NATO effort to encroach into Russia's sphere of influence with an aim to suppress Russia. The fact that each participating state had its own mission set and bilateral agreement with Kyiv was irrelevant to Moscow's perception of the SFCB in Ukraine.

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<sup>69</sup> Plochy, 348.

<sup>70</sup> "A New National Security Strategy for a New Era." The White House, December 2017.

<https://trumpwhitehouse.archives.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf>; and "Summary of the 2018 National Defense Strategy." Department of Defense, January 2018.

<https://dod.defense.gov/Portals/1/Documents/pubs/2018-National-Defense-Strategy-Summary.pdf>.

<sup>71</sup> Sperling and Webber. "NATO And the Ukraine Crisis: Collective Securitisation." *European Journal of International Security* 2, No. 1 (February 2017): 19–46.

<sup>72</sup> NATO. "Statement by NATO Foreign Ministers." Apr 1, 2014. Found at:

[https://www.nato.int/cps/en/natohq/news\\_108501.htm](https://www.nato.int/cps/en/natohq/news_108501.htm); and NATO "Wales Summit Declaration." Sep 5, 2014. Paras 1, 6, And 14. Found at: [https://www.nato.int/cps/en/natohq/official\\_texts\\_112964.htm](https://www.nato.int/cps/en/natohq/official_texts_112964.htm).

<sup>73</sup> NATO. Supreme Allied Commander Transformation, Jean-Paul Paloméros. Press Conference (21 May 2015). Found at: [www.nato.int/cps/en/natohq/opinions\\_119868.htm](http://www.nato.int/cps/en/natohq/opinions_119868.htm).

<sup>74</sup> Wales Summit Declaration, 2014.

<sup>75</sup> NATO. Warsaw Summit Communique. Jul 9, 2016. [http://www.nato.int/cps/en/natohq/official\\_texts\\_133169.htm?selectedLocale=en](http://www.nato.int/cps/en/natohq/official_texts_133169.htm?selectedLocale=en).

<sup>76</sup> Shlapak and Johnson, 2016.



Since the February 2022 invasion of Ukraine by Russian Forces, NATO has responded with a strategy of containment, avoiding direct engagement with Russian Forces on Ukrainian soil. NATO has played a role in coordinating allied sanctions and restrictions on Russia. Defensive plans have been activated and thousands of air, land and sea defence forces have deployed to the Eastern flank in support of NATO allies. The NATO Response Force was activated for the first time in February 2022 for deterrence tasks bringing around 40,000 troops under the NATO chain of command. NATO has responded with support for the bilateral transfers of thousands of anti-tank and anti-aircraft missiles from NATO member countries to Ukraine. The NATO presence in Eastern Europe has more than doubled since Russia's invasion, mostly due to US troop deployments. The US has positioned an additional 15,000 troops in Europe bringing the total to 100,000.<sup>77</sup> There are 130 aircraft and 200 ships under the NATO flag patrolling skies and waters around allies.<sup>78</sup> Four new eFP Battle Groups were stood up, and multilateral Ukrainian SFCB was relaunched under the British-led Op INTERFLEX in Ukraine. Previously less committed ally France launched its own SFCB mission. Perhaps most significantly for the alliance was the start of the membership process for important strategic partners Sweden and Finland. These advanced militaries are a significant addition to the alliance. The EU like NATO has responded to the invasion with undivided support for Ukraine. The EU launched sweeping sanctions against Russia and Belarus following the invasion and has made moves to increase ties with Ukraine and support its path to EU membership. On the humanitarian front, the EU has contributed hundreds of millions of euros toward basic humanitarian needs and has moved to offer protection for those fleeing the war. For the first time ever, the EU has committed to financing lethal arms transfers to Ukraine. As Russia continues its war in Ukraine, NATO has further decided to reinforce its allies and partners, prepare defences, support regional partners Georgia and Bosnia and Herzegovina, and continue to support bilateral aid to Ukraine.

### **Canada's Role in Responding to Russia**

In the post-Cold War era, Canada has a history of supporting Ukrainian independence and playing a leading role in NATO's response to Russian aggression. As noted above, Canada was the first country to recognize Ukraine's independence in 1991. Ukraine joined Canada's Military Training and Cooperation Program in 1993 receiving Canadian partner capacity building training. In 1994, Canada supported Ukraine's Partnership for Peace membership. And, during the 2004-2005 Election Crisis, Canada supported the pro-Ukrainian Orange Revolution.<sup>79</sup> Since 2007, Ottawa has demonstrated its intention to be "a visible and effective partner of the United States in Russia, Ukraine and zones of instability in Eastern Europe."<sup>80</sup> Canada launched international assistance for Ukraine in 2008 when Ukraine put in a bid for a NATO Membership Action Plan. Canada was one of the first and loudest opponents of the Annexation of Crimea with Prime Minister Stephen Harper especially vocal against President Putin's regime. Canada responded to the invasion of Crimea with sanctions against Russian individuals and entities, hundreds of millions of dollars in international assistance to Ukraine, and two

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<sup>77</sup> John F. Kirby, "Readout of Secretary of Defense Lloyd J. Austin III's Calls With NATO Ally Counterparts," U.S. Department of Defense, February 24, 2022, <https://www.defense.gov/News/Releases/Release/Article/2945927/readout-of-secretary-of-defense-lloyd-j-austin-iii-calls-with-nato-ally-counterparts/>. and Department of Defense, "Factsheet: Posture Updates in Support of Allies in Europe," March 8, 2022, <https://media.defense.gov/2022/Mar/08/2002952460/-1/-1/1/2022-0308-MAR-5-SDOB-FACTSHEET-POSTURE-IN-SUPPORT-OF-ALLIES-IN-EUROPE.PDF>.

<sup>78</sup> NATO, "Press Conference by NATO Secretary General Jens Stoltenberg Following the Extraordinary Meeting of NATO Ministers of Foreign Affairs," NATO, March 4, 2022, [https://www.nato.int/cps/en/natohq/opinions\\_192739.htm](https://www.nato.int/cps/en/natohq/opinions_192739.htm).

<sup>79</sup> Mark MacKinnon. "Agent Orange: Our Secret Role in Ukraine." *Globe and Mail*, April 14, 2007.

<https://www.theglobeandmail.com/incoming/agent-orange-our-secret-role-in-ukraine/article1354140/?page=all>.

<sup>80</sup> Department of Foreign Affairs and International Trade. 2006. Archived – RPP 2006–2007: 3.1 Summary of plans and priorities for 2006–2009. *Treasury Board of Canada Secretariat*, August 26. <https://www.tbs-sct.gc.ca/rpp/2006-2007/fait-aeci/fait-aeci03-eng.asp>.

expeditionary military operations.<sup>81</sup> Canada launched Op REASSURANCE in April 2014 to provide assurance to NATO allies in collective defensive first in Poland and then as the “Framework Nation” (lead) of the eFP Battle Group in Latvia starting in 2017.

In April and May of 2014, the CAF deployed to Eastern Europe an air task force of CF-188 Hornets, a frigate under the Standing NATO Maritime Group (SNMG) and a land task force, a light rifle company, based out of Drawsko Pomorskie Training Area, Poland. In 2016 at NATO’s Warsaw Summit, the eFP model was agreed on establishing four multinational battle group lead by the “Framework Nation” supported by “Contributing Nations” dispersed in the countries assessed to be the most at risk of Russian attack Estonia, Latvia, Lithuania and Poland. In June of 2017, the Canadian-led NATO eFP battlegroup Latvia was stood up at Camp Adazi, Latvia where the mission remains today. Prime Minister Justin Trudeau continued Canada’s missions in Latvia and Ukraine in 2015 upon his election. He expanded Op REASSURANCE announcing that Canada would lead the Latvia eFP Battle Group. Minister of Foreign Affairs Stéphane Dion labelled Canada’s mission in Latvia in an address to the House of Commons on September 9, 2016 as a “deterrence against Russian aggression.”<sup>82</sup> The last Canadian land forces in Poland left in August of 2017. Op REASSURANCE increased in troop commitment to Latvia from 455 to 540 in July 2018, and in June 2021 a permanent Task Force Latvia Headquarters building was opened right beside the Latvian National Armed Forces Joint Headquarters. In June 2022, in response to Russia’s War in Ukraine, Canada announced alongside Latvian leadership that it would increase eFP Latvia to brigade size in line with similar increases in troop commitments from the USA and UK to region.<sup>83</sup> This announcement also featured a commitment to fielding critical land force capabilities such as air-defence and anti-tank which are currently lacking in the Canadian Army. This expansion is in addition to the 100 personnel already deployed to Poland under Op REASSURANCE to assist with the evacuation of displaced Ukrainians. Canada’s commitment to NATO in Latvia kept the Americans happy and the French and Germans free to continue their missions in Africa. The payoff of Canada’s leadership of an eFP battlegroup soon-to-be brigade is international clout. This is a contribution to NATO that distracts from Canada’s insignificant defence budget.

Canada announced Op UNIFIER in April 2015 to develop the capacity of Ukrainian security forces. Trudeau’s government defended the charge that Russia’s military adventurism was responsible for the crisis in Ukraine and continued support for Ukraine. The mission started in September 2015 in Starychi and Kamianets-Podilskyi with a deployment of 200 soldiers. In November of the same year, the Joint Multi-National Training Group – Ukraine led by the USA was established in Starychi with Canada, Lithuania, and UK present at the opening ceremony. Op UNIFIER started at grassroots level with Canadian NCOs and junior officers developing training plans and conducting training directly with Canadian instructors leading much of the training. As the war in the Donbas continued, the Government of Canada extended the mission and made efforts to further increase ties with Ukraine such as the May 2018 Technical Arrangement with the Ministry of Interior of Ukraine and sustain their operations with

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<sup>81</sup> Global Affairs Canada. “Canada’s Engagement in Ukraine.” Government of Canada, February 16, 2020. [https://www.international.gc.ca/world-monde/country-pays/ukraine/relations.aspx?lang=eng](https://www.international.gc.ca/world-monde/country-pays/ukraine/rerelations.aspx?lang=eng); and “Canadian Sanctions Related to Russia.” Global Affairs Canada. Government of Canada, January 14, 2020. [https://www.international.gc.ca/world-monde/international\\_relations-relations\\_internationales/sanctions/russia-russie.aspx?lang=eng](https://www.international.gc.ca/world-monde/international_relations-relations_internationales/sanctions/russia-russie.aspx?lang=eng); and “Canadian Sanctions Related to Ukraine.” Global Affairs Canada. Government of Canada, March 11, 2021. [https://www.international.gc.ca/world-monde/international\\_relations-relations\\_internationales/sanctions/ukraine.aspx?lang=eng](https://www.international.gc.ca/world-monde/international_relations-relations_internationales/sanctions/ukraine.aspx?lang=eng).

<sup>82</sup> Stéphane Dion. “Statement in House of Commons.” *Parliament of Canada*, Sep 19, 2016. <http://www.parl.gc.ca/HousePublications/Publication.aspx?DocId=8381558>.

<sup>83</sup> Government of Canada. “Canada and Latvia Sign Joint Declaration to Augment NATO’s Enhanced Forward Presence Latvia.” Department of National Defence. June 29, 2022. <https://www.canada.ca/en/department-national-defence/news/2022/06/canada-and-latvia-sign-joint-declaration-to-augment-natos-enhanced-forward-presence-latvia.html>.

non-lethal military aid. As the mission progressed, some Ukrainian training authorities began to incorporate Canadian Training Plans into their training system taking the initial drafts and making them their own. Although the initial focus of Op UNIFIER was geared heavily to military police training and unit collective training, the mission progressed to include combat support functions such as reconnaissance, sniper, and sapper training; special forces training; development of standardized combat medic training; standardized NCO and junior officer training; and unit and formation collective training with Ukrainian and Canadian observer controllers. The Canada-Ukraine Free Trade Agreement and the Canada-Ukraine Defence Cooperation Agreement were also signed to eliminate trade barriers with Ukraine and increase cooperation in military policy.<sup>84</sup> Op UNIFIER was the largest NATO military training mission run in coordination with similar training missions led by NATO allies. Sweden was the only non-NATO member of the MJC. However, it is NATO Partner for Peace programme member and all Sweden's tactical level advisors were attached to Op UNIFIER and reported to the Canadian chain of Command. Op UNIFIER was paused temporarily in early 2022 at the brink of the invasion but resumed in the UK in August of 2022. Forty more trainers were announced to deploy to Poland to support SFCB efforts there.

Op UNIFIER contributed to the greater NATO deterrence strategy according to Canada's leadership. Former Minister of National Defence Harjit Sajjan said in parliament on March 20, 2017 that "through Op UNIFIER, we sent a clear signal of deterrence to Russia, and we also sent a strong message of solidarity and support to Ukraine."<sup>85</sup> Former Ukrainian Ambassador to Canada Andriy Shevchenko called Op UNIFIER "a powerful signal of deterrence to Russia and a strong sign of Canadian leadership in dealing with global challenges."<sup>86</sup> Canada, alongside the US, supported Ukraine's NATO membership bid of September 30, 2022, but like the US would not commit to a fast-track process.

Despite the remarks of the Minister and the Ambassador, Op UNIFIER did not deter Russia from invading Ukraine in 2022. The Minister and the Ambassador were only in a position to repeat the NATO consensus that NATO must deter Russia from advancing west, but not in a position to set a NATO policy of Russian deterrence in Ukraine. The operation was part of the enabling of Ukraine's path to NATO membership and sent a message to Russia and to allies that Canada was willing to accept risk in sending members of the Canadian Armed Forces to Ukraine notwithstanding the massive Russian army poised in attack positions surrounding the country. In later rotations of Op UNIFIER, small teams were deliberately deployed further South and East than before to send a message that Canada and by extension NATO is present in Ukraine and will support Ukrainian units under Southern and Eastern operational commands through SFCB. The closer that Op UNIFIER personnel got to the Joint Forces Operations in Donbas, the more valid the tripwire deterrence became in Ukraine.

Canada has been active in sending weapons and equipment into Ukraine since the February 2022 invasion and has augmented its sanction regime against Russia. At the start of the 2022 war, Canada joined the International Ukraine Support Group with the UK and Netherlands in addition to ramping up sanctions on Russia and shipments of aid (lethal and humanitarian) and money to Ukraine. Canadian volunteers poured into Ukraine. Although out of governmental control, so many Canadians joined

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<sup>84</sup> See Lee Berthiaume. 2016. Trudeau to sign free-trade deal with Ukraine. *Canadian Press*, July 10. <https://www.theglobeandmail.com/news/world/trudeau-to-sign-free-trade-deal-with-ukraine/article30848223/>. Accessed 2 July 2017. and National Defence. 2017. Government of Canada signs defence cooperation arrangement with Ukraine. *Government of Canada*, April 3. [https://www.canada.ca/en/department-national-defence/news/2017/04/government\\_of\\_canadasignsdefencecoOparrangementwithukrain.html](https://www.canada.ca/en/department-national-defence/news/2017/04/government_of_canadasignsdefencecoOparrangementwithukrain.html). Accessed 2 July 2017.

<sup>85</sup> Harjit S. Sajjan. House of Commons Statement. The Parliament of Canada, March 20. <http://www.parl.gc.ca/HousePublications/Publication.aspx?Language=E&Mode=1&DocId=8832958>. Accessed 10 Sept 2017.

<sup>86</sup> Murray Brewster. "Canada Extending Military Mission in Ukraine to 2019." *CBC News*, March 6, 2017. <http://www.cbc.ca/news/politics/canada-ukraine-military-mission-1.4011870>.

Ukraine's international legion that they made their own battalion.<sup>87</sup> Canada initially increased defence expenditures since the War in Ukraine started in 2014 with commitments through Stephen Harper's Economic Action Plan in 2015 in line with the *Canada First* Defence Strategy. This was followed by further spending commitments in *Strong, Secure, Engaged* in 2017 under the government of Justin Trudeau. Budget 2021 committed additional funding to the Department of National Defence, with Budget 2022 launched on April 6 2022 following the invasion of Ukraine further increasing defence spending on a variety of projects namely to support an increase in Canadian troop deployments on NATO missions. However, Canada's defence expenditures still fall below NATO's guideline.

### **The Fallacy of Non-Lethal Military Aid**

Immediately prior to Russia's full-scale invasion of Ukraine, there was debate surrounding the provision of lethal military equipment to Ukraine in its fight against Russian backed forces in the Donbas. This debate ended with the full-scale invasion with many countries stepping up to supply Ukraine with man portable anti-armour and anti-air weapons. Lethal aid hesitant countries like Germany and Canada stepped up too, reversing previously hard-line policies. Prior to the 2022 invasion, the Canadian government provided what was termed non-lethal aid to Ukraine in the form of non-lethal equipment and training. However, the first few weeks since the invasion have proven that NATO member training efforts in Ukraine made the security forces much more lethal against Russian ground forces. Military expertise and training can also be weaponized through advisors in a way that avoids direct military confrontation.<sup>88</sup> Canadian military advisors in Ukraine may not have been a deterrent against Russian invasion. However, the 2022 invasion did not start until after all NATO troops had left the country. Russia was quite vocal in opposition to Canadian forces being stationed in Ukraine because they understood the lethality of Canadian SFCB in a way that Canadian media does not portray. Canada made Ukrainian soldiers more lethal and more combat ready. This directly threatens the lives of Russian service personnel operating in Ukraine. The impact of this training and the lethality of Canada's aid is evident as lethal aid as Russia struggles to meet its tactical objectives against a fierce SFU. Putin is not up against the same Ukrainian security forces that he walked over in 2014. This is because of the fierce resilience and bravery of the Ukrainian soldiers and years of NATO quality military training and SSR.

### **NATO Burden-Sharing**

A critical component affecting NATO's response to Russia's hybrid war in Ukraine has been the debate surrounding burden-sharing. Most NATO member countries do not contribute the required two percent of GDP toward defence expenditures of which 20% is to be dedicated toward equipment. President Donald Trump was the most notable figure to have publicly implied that NATO's Article 5 collective defense measures may not be extended to countries who do not pay their fair share spreading doubts over NATO's future. Many experts have commented on the disparities in defence expenditures amongst NATO members. Interestingly, most of NATO's multinational battle groups, including two of the lead countries (Germany and Canada), are staffed and lead by countries who do not meet NATO's 2% defence expenditure guideline. To many NATO pundits, burden-sharing is not as important to the effectiveness of the alliance as some have suggested. Barry Posen argues, "alliance partisans on both sides of the Atlantic find complaints about burden-sharing irksome not only because they ring true but also because they secretly find them unimportant. The actual production of combat power pales in

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<sup>87</sup> Tom Blackwell. "Exclusive: So Many Canadian Fighters in Ukraine, They Have Their Own Battalion, Source Says." National Post, March 11, 2022. <https://nationalpost.com/news/world/exclusive-so-many-canadian-fighters-in-ukraine-they-have-their-own-battalion-source-says>.

<sup>88</sup> Confirmed by the author's experience as Commander of the Non-Commissioned Officer Development Group, Joint Task Force - Ukraine on Rotation Eleven of Operation UNIFIER.

comparison to the political goal of gluing the United States to Europe no matter what.”<sup>89</sup> The net contributors to NATO, led by the US, can allow a level of “freeriding” or “easy riding” if it means keeping everyone in the alliance on the same side.

Benjamin Zyla argues that NATO’s 2% defence expenditure guideline is an outdated and ineffective as a metric of collective defence contribution since countries with smaller budgets have been shown to deploy a greater share of their active-duty personnel to conflicts since the 1990s<sup>90</sup>. The 2% target for defence spending, argues Economist Robert Higgs, is an arbitrary spending target for defence. GDP is the total value of all goods and services produced in a year by a country’s economy. By tying defence spending to GDP, the budget is affected by irrelevant production statistics including, “everything from hamburgers to H-bombs.”<sup>91</sup> There are also NATO members, specifically Canada and Germany, who despite not meeting the 2% spending guideline surpassed most other countries in absolute spending, but this absolute spending does not shield these countries from criticism of their failure to meet the 2% guideline. Anthony Cordesman suggests, to keep moving forward, the Alliance needs to abandon arbitrary metrics such as the goal of 2% of GDP and 20% on equipment.<sup>92</sup> As-Cordesman succinctly puts it, “Spending more should not be the priority. Spending wisely should be.”<sup>93</sup>

### **Expeditionary Expediency**

Canada may not be spending more money on NATO, but it has spent wisely. Leuprecht and Sokolsky use the term “expeditionary efficiency” to describe the way Canada deploys soldiers on relatively inexpensive missions as a strategy to demonstrate Canada’s commitment to the NATO alliance and burden-sharing.<sup>94</sup> Canada’s experience as a middle power plays a role in its strategy to gain favour with allies and attention on the international stage by participating in military operations in support of allies or on multilateral peace support operations. Canadian political leaders are aware of the permissive attitudes of its allies including the US toward Canada’s lack-luster defence spending. Canadian leadership understands that it’s defence spending is tolerated due to Canadian contributions on expeditionary operations. This understanding is factored into the “how much is enough” calculation. Leuprecht and Sokolsky quote Bercuson and Granatstein arguing that Canada’s strategy of deploying soldiers overseas despite its middle power status can,

... show larger nations (e.g., Britain and the United States), international organizations, such as the United Nations, or allied nations such as the members of NATO that Canada is ready and able to put a shoulder to the wheel when military forces are needed to defend allies, deter aggression, or keep or enforce the peace. In other words, Canada has been willing to do its share of the hard, dirty work. Doing so wins Canada diplomatic recognition, political acceptance, entry into arrangements, treaties, and alliances that are important to Canada and Canadians, and a voice on how future international policies will be pursued. Were Canada not to take part in such missions abroad, friends and enemies alike would have concluded long ago that Canada is of no

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<sup>89</sup>Barry Posen, “The Rise of Illiberal Hegemony: Trump’s Surprising Grand Strategy, *Foreign Affairs* 97 2 (March/April 2018), pp. 21-22.

<sup>90</sup> Benjamin Zyla. “Who Is Free-Riding in NATO’s Peace Ops in the 1990s?” *International peacekeeping* (London, England) 23, no. 3 (2016): 416–441.

<sup>91</sup> Robert Higgs. 2008. *Military Spending / GDP = Nonsense for Budget Policy Making*. <https://www.independent.org/news/article.asp?id=2143>

<sup>92</sup> Anthony Cordesman, with the Assistance of Max Molot, *NATO’s “Brain Death” Burdensharing Blunders: Focusing on the Right Investment, Force Strength, and Readiness Needs*. (Washington, D.C. Center for Strategic and International Studies), 2019, p. 1. (*Italics in original*)

<sup>93</sup> *Ibid*, p. 3 (*Italics in original*).

<sup>94</sup> Christian Leuprecht and Joel J. Sokolsky, “Defence Policy “Walmart Style”: Canadian Lessons in “no-so-grand” Grand Strategy,” *Armed Forces and Society*, Vol. 41 No. 3 2015

consequence, does not deserve to be heard and ought not to be accorded any favours in bilateral or multilateral negotiations over matters of consequence.<sup>95</sup>

Also quoted by Leuprecht and Sokolsky, James Eayrs argues, “the main and overriding motive for the maintenance of Canadian military establishment since the Second World War has had little to do with our national security as such [ . . . ] it has had everything to do with underpinning our diplomatic and negotiating position vis-a`-vis various international organizations and other countries.”<sup>96</sup> Both authors suggest that Canada uses the Canadian Armed Forces as a tool to bolster its position in international collective security and collective defence organizations. With NATO so critical to Canada’s defence strategy, Canadian foreign policy is designed to demonstrate military skill and readiness and commitment to allied values. Commitments to the alliance must be balanced against a limited defence budget.

Canada’s Op UNIFIER was a low-risk option to contribute to countering an encroaching threat to strategic partners in a politically and economically safe way through SFCB and SSR. Comparing Canada’s two major operations in Europe responding to the war in Ukraine, the assurance mission Op REASSURANCE was planned to cost \$131 million in FY 20/21 whereas the SFCB mission Op UNIFIER was planned to cost only \$26 million.<sup>97</sup> Canada demonstrated an ability to spend wisely on Op UNIFIER running the largest military mission in Ukraine training over 30,000 SFU since 2015 from the highest levels of the General Staff to private soldiers for roughly \$13 million dollars per rotation. Canada supported Ukraine through training because it hoped to make a significant contribution to NATO by enabling NATO enlargement without increasing defence spending to 2% of GDP. Canadian military advisors supporting the security forces of Ukraine aligned their training with NATO doctrine and standardization. This training made Ukraine more interoperable with NATO exercises and operations, strengthening their forces against Russia and improving the likelihood that Ukraine will transition from Enhanced Opportunity Partner to full NATO membership. Canada enhanced its international military reputation as a leader in NATO by bringing Ukraine closer to NATO standards. The reforms put into practice in the past years and the SFCB and SSR activities carried out by Canada and Allies have proven to be a force multiplier of Ukrainian forces in 2022. The fruits of the labours of NATO advisors in Ukraine are readily apparent in the performance of the Ukrainian soldiers. For example, the decentralized command approach to operations which has been emphasized over successive rotations of Op UNIFIER has been proven successful in the form of small task-oriented tank hunting teams and in reports of junior leaders being enabled to make tactical decisions while respecting the higher purpose and concept of operations.

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<sup>95</sup> David J. Bercuson and J. L. Granatstein, “From Paardeberg to Panjwai: Canadian National Interests in Expeditionary Ops,” in *Canada’s National Security in the Post 9-11 World*, ed. David S. McDonough (Toronto, Canada: University of Toronto Press, 2012), 193-194

<sup>96</sup> James Eayrs, “Military Policy and Middle Power: The Canadian Experience,” in *Canada’s Role as a Middle Power*, ed. J. King Gordon (Toronto, Canada: Canadian Institute of International Affairs, 1965), 84.

<sup>97</sup> Department of National Defence. “Planned Costs for Major Canadian Armed Forces Ops.” Government of Canada, Mar 3, 2021. <https://www.canada.ca/en/department-national-defence/corporate/reports-publications/departmental-plans/departmental-plan-2021-22/supporting-documents/planned-costs-major-caf-Ops.html>

## Chapter 2. Literature Review

### **Russia in Ukraine**

According to the Foreign Policy Concept of The Russian Federation approved by President Putin in 2000, “Russia shall seek to achieve a multi-polar system of international relations.”<sup>98</sup> Literature on Russia’s war in the Donbas focuses on Russia’s goals of regional hegemony and global multipolarity.<sup>99</sup> Carol Weaver argues in *An Introduction to the Politics of the Black Sea Nations* that the Russian federation is simply continuing the strategic aims detailed in President Putin’s *Foreign Policy 2000*.<sup>100</sup> The intent of the foreign policy is “to ensure reliable security of the country...to achieve firm and prestigious positions in the world community...consistent with the interests of the Russian Federation as a great power” and “to form a good-neighbor belt.”<sup>101</sup> Russia’s continued involvement in Ukraine is indicative of a desire to maintain Ukraine as an allied neighbour. The Kremlin argues that the EU and NATO, collectively the West, are encroaching on Russia. Barry Buzan and Ole Weaver argue that “a handful of states at the top of the power league play a truly global game, treating each other as a special class, and projecting their power into far-flung regions. But for the great majority of states, the main game of security is defined by their near neighbours.”<sup>102</sup> Ukraine has historically served as a controllable buffer state separating European armies from Russia. With Ukraine shifting toward the West, Russia faces the long-term prospect of losing its strategic buffer. Russia must dominate this neighbour.<sup>103</sup> Ukraine has strategic national security value as a buffer state between Russia and the West. As Ukraine continued to align itself with EU and NATO in first decade of the twenty-first century, Russia believed that it must act to reverse this trend.

Scholars such John Owen, William Inboden, John Mearsheimer, Andrei Tsygankov argue that Russia was simply reacting to the West in accordance with its stated foreign policy and was being ignored by the West. Graham Allison and Dimitri Simes argue, “Russia’s establishment sentiment holds that the country can never be secure if Ukraine joins NATO or becomes a part of a hostile Euro-Atlantic community.”<sup>104</sup> Russian interests have been neglected by the West. In 1993, President Clinton told President Yeltsin that NATO would not expand to include former Soviet Republics. However, Estonia, Latvia and Lithuania are now NATO members and work was underway to include Georgia and Ukraine when they are ready prior to the 2022 invasion. Ukraine has indicated post-invasion 2022 that it may be willing to give up NATO membership in a peace agreement with Russia, but this was abandoned after the illegal annexations of September 2022. John Owen and William Inboden argue that “today’s realists are correct in saying that the EU and the United States need to recognize that Russia has legitimate security concerns on its western borders.”<sup>105</sup> Mearsheimer argues that Russia’s actions in Ukraine are in response

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<sup>98</sup> Rossiyskaya Gazeta, 2014.

<sup>99</sup> Jeffrey Mankoff. *Russian Foreign Policy: The Return of Great Power Politics*. 2nd Ed. Lanham, Md: Rowman & Littlefield Publishers, 2012.

<sup>100</sup> Carol Weaver. *The Politics of The Black Sea Region: EU Neighbourhood, Conflict Zone, or Future Security Community?* Farnham, Surrey, England: Ashgate Publishing Limited, 2013.

<sup>101</sup> *Ibid*, 29.

<sup>102</sup> Barry Buzan and Ole Wæver. *Regions and Powers: The Structure of International Security*. Cambridge University Press, 2003, 14.

<sup>103</sup> Götz. “Neorealism and Russia’s Ukraine Policy, 1991-Present.” and Götz. “Putin, The State, And War: The Causes of Russia’s Near Abroad Assertion Revisited.”

<sup>104</sup> Graham Allison and Dimitri Simes. *Russia And America: Stumbling to War*. The National Interest. (2015) [Http://NationalInterest.Org/Feature/Russia-America-Stumbling-War-12662](http://NationalInterest.Org/Feature/Russia-America-Stumbling-War-12662)

<sup>105</sup> John M. Owen, and William Inboden. “Putin, Ukraine, And the Question of Realism.” *The Hedgehog Review* 17, No. 1 (2015).

to NATO's actions.<sup>106</sup> As noted, NATO is an enduring threat to Russia according to the Voennaya Doktrina of 2014, the latest Russian strategic doctrine published in the Russian Gazette.<sup>107</sup> But it is also argued that NATO and the West did try to reach out to Russia. Relations started in 1991 with the North Atlantic Cooperation Council. In 1994, Russia joined NATO's Partnership for Peace Program. This was followed by the 1997 Founding Act on Mutual Relations, Cooperation and Security which was then succeeded in 2002 by the NATO-Russia Council (NRC) which was established "as a mechanism for consultation, consensus-building, cooperation, joint decision and joint action." Russia was also admitted to the G-7, making it the G-8 until the invasion of Crimea when it was removed.

Eight years after Russia's annexation of Crimea, much has been written regarding the Russian incursion and Moscow's continued actions in the Donbas region enabling pro-Russian violence. American strategy in Europe and the role of NATO has been similarly thoroughly discussed. A large body of literature regarding the conflict in Ukraine is historical in nature and descriptive, focusing on the conditions that led to Russia's incursion into Ukrainian territory. Serhii Plokhy puts forward an interesting environmental determinism argument. Ukraine occupies a sizeable portion of the open Pontic-Caspian Steppe region which acts as plain connecting Europe to the East which can be used as a possible invasion route between Russia and Europe. Hitler's Wehrmacht Army Group South invaded through these same Ukrainian plains in 1941. Russia is interested in Ukraine therefore for its ability to connect Russia via the Black Sea but also for the plains of Southern Ukraine that act as an entrance into Europe or as a buffer between Russia and the West. Marvin Kalb, Orest Subtelny and Serhy Yekelchyk portray the Russian Federation as the imperialist bully of the region with President Putin continuing a long tradition of Russian subjugation of the Ukrainian people.<sup>108</sup> Richard Sakwa, Anna Matveeva, and Serhii Plokhy focus on the internal West versus East, ethnic Ukrainian versus ethnic Russian divide constructed over centuries of Russian regional dominance.<sup>109</sup> Taras Kuzio, Rajan Menon, Eugene Rumer and Gerard Toal analyze Russia's Grand Strategy and argue that Ukraine lies in the midst of a regional power competition between Russia and the US in which the Russian Federation is disrupting American influence in Europe with an aim to regain influence over former Soviet territories.<sup>110</sup>

## The United States in Ukraine

A similarly large portion of the literature of the conflict in Ukraine involves America's response to Russia's incursion, particularly sanctions against Russia and the provision of training, weapons, and cash for Ukraine. Some experts argue that although Washington has supported Ukraine since its

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<sup>106</sup> Mearsheimer. "Why the Ukraine Crisis Is the West's Fault: The Liberal Delusions That Provoked Putin." and Mearsheimer. "John Mearsheimer on Why the West Is Principally Responsible for the Ukrainian Crisis." *The Economist*, March 19, 2022. [https://www.economist.com/by-invitation/2022/03/11/john-mearsheimer-on-why-the-west-is-principally-responsible-for-the-ukrainian-crisis?gclid=CjwKCAjwuYWSBhByEiwAKd\\_n\\_rCThtvYw2DoYUnnaZD-rCrHrYF2zaJ4L46zRFhhXWdCRnqCDdP2sRoCeTIOAvD\\_BwE&gclid=aw.ds](https://www.economist.com/by-invitation/2022/03/11/john-mearsheimer-on-why-the-west-is-principally-responsible-for-the-ukrainian-crisis?gclid=CjwKCAjwuYWSBhByEiwAKd_n_rCThtvYw2DoYUnnaZD-rCrHrYF2zaJ4L46zRFhhXWdCRnqCDdP2sRoCeTIOAvD_BwE&gclid=aw.ds).

<sup>107</sup> Rossiyskaya Gazeta. (2014).

<sup>108</sup> Marvin L. Kalb *Assignment Russia: Becoming a Foreign Correspondent in the Crucible of the Cold War*. Washington, D.C: Brookings Institution Press, 2021; Subtelny, Orest. *Ukraine a History*. 4th ed. Toronto [Ont: University of Toronto Press, 2009; Yekelchyk, Serhy. *Stalin's Empire of Memory Russian-Ukrainian Relations in the Soviet Historical Imagination*. Toronto, Ont: University of Toronto Press, 2004; and Yekelchyk, Serhy. *The Conflict in Ukraine: What Everyone Needs to Know*. Oxford: Oxford University Press, 2015.

<sup>109</sup> Richard Sakwa. *The Crisis of Russian Democracy: The Dual State, Factionalism, and the Medvedev Succession*. Cambridge: Cambridge University Press, 2011; Matveeva, Anna. *Through Times of Trouble: Conflict in Southeastern Ukraine Explained from Within*. Lanham, Maryland: Lexington Books, 2018; and Plokhy (2015).

<sup>110</sup> Taras Kuzio. *Ukraine: Democratization, Corruption, and the New Russian Imperialism*. Santa Barbara, California: Praeger, an imprint of ABC-CLIO, 2015; Menon, Rajan, and Eugene B. Rumer. *Conflict in Ukraine: The Unwinding of the Post-Cold War Order*. Cambridge, Massachusetts: The MIT Press, 2015; and Toal, Gerard. *Near Abroad: Putin, the West, and the Contest over Ukraine and the Caucasus*. New York: Oxford University Press, 2020.



independence, the US did not do enough to protect Ukraine from Russian influence.<sup>111</sup> Since Russia's invasion of Crimea, the US responded through three broad avenues outlined in former US Ambassador to Ukraine Mr Steven Pifer's testimony to the US Senate Foreign Relations Committee: "(1) bolster the Ukrainian government; (2) reassure NATO allies unnerved by Moscow's aggressive behavior; and (3) penalize Russia with the objective of promoting a change in Russian policy".<sup>112</sup> The US has sanctioned many notable Russian figures, improved trade relations with Ukraine, and has supported its military directly through collective training and lethal weapon shipments. Washington has reassured regional NATO allies through its commitment to NATO's eFP in Poland. Experts such as Steven Spifer argued after the 2014 invasion that America needs to expand its list of sanctioned Russians, target Russia's financial markets and influence Ukraine to implement more cultural and language protections for ethnic Russians.

Study of America's response to the invasion of 2022 is divided between analysis of American-led sanctions and the American military response as the foremost NATO member to include provision of military aid and other security assistance to Ukraine and deployment of combat formations and key equipment to NATO countries. The US responded to Russia's invasion with leadership imposing what it hoped would be far-reaching and devastating economic sanctions, sending shipments of man portable anti-armour and anti-air weapons to Ukrainian forces as well as transferring billions in funding for both security related and humanitarian relief projects in Ukraine. In part this extensive response is meant to eliminate fears that the US's geostrategic shift toward the Indo-pacific would lead to ambivalence over Ukraine's security status. Francis Fukuyama laments the Russian attack against the American-led liberal world order while praising America's leadership in mobilizing and uniting NATO in response to the invasion.<sup>113</sup> The American polity has struggled with divisions for years, but support for Ukraine in its defence against Russia has seen bipartisan support.

## NATO in Ukraine

European Security experts such as Sharyl Cross argue that NATO's relationship with Russia defines European security. Geography dictates that NATO would be the vehicle for American and European response to Russia in Ukraine. The Alliance's response to the events of 2014 has been centred on collective securitization and efforts to prepare Ukraine for NATO membership. James Sperling and Max Webber have written extensively on this process.<sup>114</sup> NATO trust funds and supporting programs as well member country contributions such as Canada's SFCB mission shaped Ukraine to one day become a member country. Preliminary study of NATO's response to Russia's full-scale invasion is centred on the degree of allied solidarity in NATO's collective defence and the extent to which the eastward expansion of NATO membership has provoked Russia's invasion. Ted Galen Carpenter, John Mearsheimer, Wolfgang Streeck, Jeffrey Sachs all regard the war in Ukraine as a war "over" Ukraine pitting an overzealous and expansionist NATO against the Russian Federation fighting to hang onto its historic sphere of influence.<sup>115</sup>

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<sup>111</sup> Steven Pifer. *The Eagle and the Trident: U.S.—Ukraine Relations in Turbulent Times*. Washington DC: Brookings Institution Press, 2017.

<sup>112</sup> Steven Pifer. "Ukraine, Russia and the U.S. Policy Response," Testimony 2014. <https://www.brookings.edu/testimonies/ukraine-russia-and-the-u-s-policy-response/>

<sup>113</sup> Francis Fukuyama. "Francis Fukuyama: Putin's War on the Liberal Order." *Financial Times*, March 4, 2022. <https://www.ft.com/content/d0331b51-5d0e-4132-9f97-c3f41c7d75b3>.

<sup>114</sup> Sperling and Webber. (2017).

<sup>115</sup> Ted Galen Carpenter. "Many Predicted NATO Expansion Would Lead to War. Those Warnings Were Ignored." *The Guardian*, February 28, 2022. [https://www.theguardian.com/commentisfree/2022/feb/28/nato-expansion-war-russia-ukraine?utm\\_term=Autofeed&utm\\_medium=CMP=tw\\_t\\_gu&utm\\_medium=medium&utm\\_source=Twitter#Echobox=1646074880](https://www.theguardian.com/commentisfree/2022/feb/28/nato-expansion-war-russia-ukraine?utm_term=Autofeed&utm_medium=CMP=tw_t_gu&utm_medium=medium&utm_source=Twitter#Echobox=1646074880). and Mearsheimer (2022). and Wolfgang Streeck. "Fog of War." *Sidecar*. *New Left Review*, March 1, 2022. <https://newleftreview.org/sidecar/posts/fog-of-war>. and Jeffrey Sachs. "The US Should Compromise on NATO to Save Ukraine." *Financial Times*, February 21, 2022. <https://www.ft.com/content/b5886606-4d7d-41af-87c1-8d9993722e51>.

Critics of this approach suggest it ignores Ukraine's autonomy as a sovereign nation and the right of the Ukrainian people to decide their strategic alignment. This was one of the principles agreed to by the former Soviet Union when it signed the Helsinki Accords in 1975. It was based on these accords that Mikhail Gorbachev concurred with President George H.W. Bush in 1990 that a united Germany could be part of NATO. Furthermore, discussions of "allowing" Russia to regain its influence over Ukraine by force to avoid worsening tensions between Russia and NATO have been rebuked as appeasement of President Vladimir Putin. On the other hand, Alexander Vershbow, Steven Pifer and Oleh Shamshur argued in 2021 that not only is Ukraine not yet ready to join NATO, NATO will have to consider how Russia will retaliate.<sup>116</sup> Thus, the literature has been and remains divided as to how, when, and even if Ukraine will join NATO. Negotiations between Ukrainian and Russian delegations since the invasion have included discussions of Ukrainian neutrality. This would preclude Ukraine from entering NATO as a full member.

Some suggest that the Western response (de facto led by NATO, US, and EU) has been too weak and has empowered Russia to commit war crimes in Ukraine.<sup>117</sup> Such critics typically prescribe a full Russian oil embargo and no fly zone enforcement over Ukraine in addition to increases in weapon shipments and humanitarian aid to Ukraine and refugee status for displaced Ukrainians. Some even suggest that the US and UK have a responsibility to intervene as Ukraine was "guaranteed" that violence would not be done against it by Russia in exchange for forfeiture of all Ukrainian nuclear weapons under the 1994 Budapest Memorandum. The sanctions approach to isolating Russia is also contested. Daniel Drezner coined the term "Sanctions Paradox" to describe the many examples of the inability of sanction regimes to coerce an opponent and force concessions.<sup>118</sup> Others, especially the Ukrainians, criticize NATO and the US's refusal to "close the skies" with a no-fly zone. Richard Betts counters this critique describing the enforcement of a no-fly zone over Ukraine as an act of war against Russia and a "delusion" since enforcement of this declaration would require NATO air forces to shoot down Russian aircraft and air defenses killing Russian service personnel in the process.<sup>119</sup> Ukraine begs for US and NATO military assistance so they are not abandoned by the West in the jaws of the Russian Army. The US and NATO conversely fear entrapment in Ukraine and getting sucked into a war with Russia which could escalate to apocalyptic levels. Glenn Snyder refers to the disjointed preferences between the external larger ally and the inner smaller ally as the alliance security dilemma<sup>120</sup>.

## On NATO Burdensharing

Another critical component affecting NATO's response to Russia's hybrid war in Ukraine has been the debate surrounding burden-sharing. Particularly since the Trump administration, much has been written regarding the general lack of defence spending contribution in NATO. Most NATO's member countries do not contribute the required two percent of GDP toward defence expenditures especially toward military capital procurement. President Trump was the most notable figure to have publicly

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<sup>116</sup> Henrietta Wolter. "Experts: NATO Membership Still a Distant Dream for Ukraine." *Kyiv Post*, March 3, 2021. <https://www.kyivpost.com/ukraine-politics/experts-nato-must-think-through-before-admitting-ukraine-amid-war-with-russia.html>.

<sup>117</sup> Bohdan Klid. "Western Weakness Is Enabling Russian War Crimes in Ukraine." Atlantic Council, March 8, 2022. [https://www.atlanticcouncil.org/blogs/ukrainealert/western-weakness-is-enabling-russian-war-crimes-in-ukraine/?fbclid=IwAR1YOWTmctM1bRV08LPi6gJnTdBA7kIEuVSaLI9BoposK27K\\_Y6GMexE9LM](https://www.atlanticcouncil.org/blogs/ukrainealert/western-weakness-is-enabling-russian-war-crimes-in-ukraine/?fbclid=IwAR1YOWTmctM1bRV08LPi6gJnTdBA7kIEuVSaLI9BoposK27K_Y6GMexE9LM).

<sup>118</sup> Daniel W. Drezner. *The Sanctions Paradox: Economic Statecraft and International Relations*. Cambridge [England]: Cambridge University Press, 1999.

<sup>119</sup> Richard K. Betts "The No-Fly Zone Delusion." *Foreign Affairs*, March 10, 2022. <https://www.foreignaffairs.com/articles/ukraine/2022-03-10/no-fly-zone-delusion>.

<sup>120</sup> Glenn H. Snyder. *Alliance Politics*. Ithaca, N.Y.: Cornell University Press, 1997. and Glenn H. Snyder. "The Security Dilemma in Alliance Politics." *World Politics* 36, No. 4 (1984): 461–95. <https://doi.org/10.2307/2010183>

implied that NATO's Article 5 collective defense measures may not include countries who do not pay their fair share. However, many experts have commented on the disparities in defence expenditures amongst NATO members. This burden-sharing phenomenon is germane to NATO's response to the crisis in Ukraine because as noted above, most of NATO's multinational battalion battle groups, including two of the lead countries (Germany and Canada), are force generated by countries who do not meet NATO's 2% defence expenditure guideline.

### Canadian Defence Policy of Alliance

Canadian defence policy, according to Binyam Soloman and Craig Stone, has remained "remarkably consistent over time"<sup>121</sup> Canada's current defence policy *Strong, Secure, Engaged* is not unique in its promises of a Canada "Strong at home...Secure in North America...and Engaged in the world."<sup>122</sup> Variations of this theme have existed throughout the last few decades of Defence White Papers. Canadian foreign policy and defence policy is first and foremost multilateral and subordinate to US leadership. Op UNIFIER in Ukraine, although officially bilateral, was effectively multilateral as all NATO and NATO PfP member countries providing military training to the security forces of Ukraine were coordinated efforts through the Multinational Coordination Centre in Kyiv lead by an American Colonel. This approach is consistent with Christian Leuprecht's and Joel Sokolsky's view that "successive Canadian Governments have had an image of the military as an instrument of alliance politics."<sup>123</sup> Douglas Bland called Canada's alliance politics a "Strategy of Commitments."<sup>124</sup> Justin Massie and Srdjan Vucetic identify three strategic cultures in Canadian defence policy: empire, continentalism and Atlanticism<sup>125</sup>. These are explored later in the thesis.

The literature regarding Canada's military reaction to Russia focuses on Canada's Op REASSURANCE in Latvia and to a lesser degree Op UNIFIER in Ukraine. There are competing ideas of Canadian motivations to advise and assist in Ukraine. Talk about the neo-classical realism The liberal international approach sees Canada advising and assisting Ukraine working with international partners to promote Canadian interests and values. The neo-continental approach sees Canada's mission in Ukraine as an attempt to align with US foreign policy. The diaspora politics approach sees Canadian operations in Ukraine influenced by the large Ukrainian diaspora in Canada. The "foreign policy on the cheap" approach, described in the work of Colin Dueck and adopted in this paper, views Canada's commitments to Ukraine as a cheaper alternative to relatively significant increases in defence spending.<sup>126</sup>

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<sup>121</sup> Binyam Solomon and Craig Stone. "Canadian Defence Policy and Spending". *Defence and Peace Economics* 16 (3) 2005. Page 151.

<sup>122</sup> Government of Canada, Department of National Defence. *Strong, Secure, Engaged: Canada's Defence Policy*. Minister of National Defence. 2017. Page 59.

<sup>123</sup> Leuprecht and Sokolsky, "Defence Policy "Walmart Style"

<sup>124</sup> Douglas Bland. Canada's National Defence: Volume 2, Defence Organization. *Kingston: Queen's University School of Policy Studies* 2 1998. Page 407.

<sup>125</sup> Justin Massie and Srdjan Vucetic. "Canadian Strategic Cultures: From Confederation to Trump." in T. Juneau et al. (eds.). *Canadian Defence Policy in Theory and Practice*. Canada and International Affairs. Palgrave Macmillan. 2020.

<sup>126</sup> Colin Dueck. "Hegemony on the Cheap: Liberal Internationalism from Wilson to Bush." *World Policy Journal* 20, no. 4 (2003): 1-11. Accessed April 27, 2021. <http://www.jstor.org/stable/40209884>. And Craig Johnstone. "Foreign Policy on the Cheap: You Get What You Pay For." U.S. Department of State dispatch 7, no. 13 (1996): 146-. And Sally C Pipes. "Capital Ideas: Foreign Policy on the Cheap." *Chief executive* (New York, N.Y. 1977), no. 141 (1999): 16-. And Leo Abruzzese. "Sanctions: Foreign Policy on the Cheap." *The journal of commerce* (New York, N.Y. 1996) 415, no. 29134 (1998): 7A-. And Prosper Bernard. "Canada and Human Security: From the Axworthy Doctrine to Middle Power Internationalism." *The American review of Canadian studies* 36, no. 2 (2006): 233-261. And Jennifer M. Welsh. "Canada in the 21st Century: Beyond Dominion and Middle Power." *Round table* (London) 93, no. 376 (2004): 583-593. And Marie-Joëlle Zahar. "Intervention, Prevention, and the 'Responsibility to Protect': Considerations for Canadian Foreign Policy." *International journal* (Toronto) 60, no. 3 (2005): 723-.

Canada is a believer in the “do more with less” of foreign policy.<sup>127</sup> Canada has committed to making certain commitments to partners and allies and to uphold certain principles and values internationally while lacking the will to accept the cost.<sup>128</sup> Rod Byers in 1986 referred to this phenomenon as the “commitment-capability gap.”<sup>129</sup> It is argued that Canada’s perceived lack of financial commitment to defence expenditures exemplifies the commitment-capability gap. Canada’s Department of National Defence averages 7% of the federal budget. However, as the largest discretionary share of the federal budget, defence is an easy target for savings. Eugene Lang describes this phenomenon of defence bearing the brunt of austerities by demonstrating that few Defence White Papers in the last 20 years meet their stated aim due to insufficient financial commitment.<sup>130</sup> The liberal government committed in 2017 to increase defence budget by 70% by 2027/2028 as part of the Strong, Secure, Engaged defence policy. This is a meaningless commitment, as the percentage of GDP devoted to defence will not change drastically considering inflation and GDP growth over ten years.

### The Geography of Canadian Defence Policy

Geography plays an important role in a country’s defence policy. Ukraine is surrounded by porous land borders against hostile forces - Belarus to the north, Russia to the east and Russian controlled Crimea to the South. In contrast, Douglass Alan Ross argued that Canada enjoys “three ocean barriers plus an ‘Arctic desert’ to deter any conceivable territorial attack”.<sup>131</sup> Canada’s only land borders are with the US, a close ally. US President Franklin D Roosevelt promised in August 1938 that “the people of the United States will not stand idly by if domination of Canadian soil is threatened by any other empire”.<sup>132</sup> Kim Richard Nossal argues that Canada has nothing to worry about at home other than keeping the US happy, contributing to Canada’s drive to commit to multinational military operations.<sup>133</sup> Desmond Morton and Joel Sokolsky have argued that Canada’s defence problem lies in proving to Washington that Canada is not a liability to North American defence.<sup>134</sup> One way of proving to the Americans that Canada is not a liability is by joining in on American led multinational military operations. Phillipe Lagassé and Paul Robinson also argue that “Canada should make some visible contributions to those American-led military operations overseas which advance Canadian interests, most particularly those that do not involve prolonged interventions in foreign states.”<sup>135</sup>

Nils Ørvik branded the concept “defence against help” to describe the need for smaller states such as Canada to maintain a credible military to avoid the larger states from feeling the need to secure their lands without consent.<sup>136</sup> Following this logic, Stéphane Roussel argues, like Nossal, Morton and

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<sup>127</sup> Lieutenant-Colonel Michael Rostek. “Managing Change Within DND.” In *The Public Management of Defence in Canada*, ed. Craig Stone. 2009. Toronto: Breakout Education Network. Page 220.

<sup>128</sup> Andrew Richter. “A Defense Renaissance? The Canadian Conservative Government and the Military.” *American Review of Canadian Studies* 43 (3) 2013. Page 437.

<sup>129</sup> R.B. Byers. “Canadian Security and Defence: The Legacy and the Challenges.” *Adelphi Papers* 214 1986. Page 10.

<sup>130</sup> Eugene Lang. “The Shelf Life of Defence White Papers.” *Policy Options*. 2017. <http://policyoptions.irpp.org/magazines/june-2017/shelf-life-defence-white-papers/>.

<sup>131</sup> Douglas Alan Ross. “Canadian International Security Policy in the 21<sup>st</sup> Century: Closing the Book on the Sutherland Era? Not at All.” In *Readings in Canadian Foreign Policy: Classic Debates and New Ideas*, 3<sup>rd</sup> eds. Duane Bratt and Christopher Kukucha 2015. Toronto: Oxford University Press. Page 326-346.

<sup>132</sup> In Roger Frank Swanson. “Canadian-American Summit Diplomacy, 1923-1973.” 1975. Toronto: McClelland & Stewart. Page 52-54.

<sup>133</sup> Kim Richard Nossal. “The Imperatives of Canada’s Strategic Geography.” in T. Juneau et al. (eds.) *Canadian Defence Policy in Theory and Practice*. Canada and International Affairs. Palgrave Macmillan. 2020.

<sup>134</sup> Desmond Morton, *Understanding Canadian Defence* (Toronto: Penguin/McGill Institute, 2003), 3. Page 24. And Joel Sokolsky. Realism Canadian Style: National Security Policy and the Chrétien Legacy. *Policy Matters* 5 (2) 2004. Page 10. <http://irpp.org/wp-content/uploads/assets/pmvol5no2.pdf>

<sup>135</sup> Phillip Lagassé and Paul Robinson. “Reviving Realism in the Canadian Defence Debate.” *Martello Paper Series*. Centre for International Relations, Queen’s University. Kingston, Ontario, Canada 2008. Page 99.

<sup>136</sup> Nils Ørvik. “Defence Against Help: A Strategy for Small States.” *Survival* 15 1973. Page 228-231.

Sokolsky, that Canada must defend itself to a level satisfactory to contribute to defence of the US too.<sup>137</sup> In this way, Geography also acts as a constraint to Canada. For example, while Canada has the choice, geography essentially demands that Canada remain in the NORAD binational command arrangement as long as the US perceives the need for northern air defence.<sup>138</sup> In the House of Commons in 1875 MP David Mills remarked, “In a country situated as we are, not likely to be involved in war, and having a large demand upon our resources for public improvements, it [is] highly desirable to have our military affairs conducted as cheaply as possible”.<sup>139</sup> Canada does not need to break the bank to keep the US happy. It is reasonable then to maintain inexpensive capabilities that meet the minimum requirements to contribute to allies. Canada’s commitment to Ukraine alongside the US demonstrates Canada’s commitment to shared values. More importantly, it is an inexpensive commitment. James McKay has argued that Canada’s more recent military commitments may have been influenced by a need to convince President Trump that NATO is still effective and necessary.<sup>140</sup> This is in line with the work of scholars who study Canada-US security relations, particularly how Canada’s policy is influenced by the US and other international treaty commitments. Christian Leuprecht and Joel Sokolsky argue that Canada’s Op REASSURANCE in Latvia demonstrates Canada’s commitment to NATO via multinational deployment despite not meeting defence expenditure guidelines.<sup>141</sup> Like Op REASSURANCE, Op UNIFIER was stood up in support of NATO with an aim to increase Ukraine’s interoperability with NATO.

## Canadian Realism

As a smaller power, Canada makes foreign policy decisions in its rational best interest subject to the constraints of its competing interests and limited budget. Joel Sokolsky has argued Canada has conducted realpolitik calculations throughout its foreign policy history and has made realist decisions on defence commitments based on limited resources with a clear aim of maintaining relevance on the international stage.<sup>142</sup> Canada makes its own foreign policy decisions considering the responses of its allies but not limited to following in line with their policy. While Canada was motivated to deploy forces to Eastern Europe following successive Russian aggressions in support of broader liberal internationalism, the threat to the liberal international order originated in the Russian security threat in Europe wherein Canada has always regarded security in Europe as essential to its own physical security. The arch realist Henry Kissinger appreciated Canada’s ability to maximize its limited military resources in this way.<sup>143</sup> Phillippe Lagassé and Paul Robinson echo this, arguing, that Canada must establish a reasonable level of defence expenditures based on its stature and capabilities while balancing competing budgetary constraints.<sup>144</sup> Hans Morgenthau cautioned states of the “fallacy of the single factor.”<sup>145</sup> Power is not expressed in one single factor. Lagassé and Robinson similarly warn Canada that military strength

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<sup>137</sup> Stéphane Roussel. “Pearl Harbour et le World Trade Center: Le Canada face aux États-Unis en période de crise.” *Études internationales* 33 (4) December 2002. Page 667-695.

<sup>138</sup> D.W. Middlemiss and J.J. Sokolsky. “Canadian Defence: Decisions and Determinants.” Toronto: Harcourt Brace Jovanovich 1989. Page 149-157.

<sup>139</sup> In Desmond Morton. “Defending the Indefensible: Some Historical Perspectives on Canadian Defence, 1867-1987.” *International Journal* 42 (4) 1987. Page 627-644.

<sup>140</sup> James McKay. “Why Canada Is Best Explained as a ‘reliable Ally’ in 2017.” *Journal of Transatlantic Studies* 16, no. 2 (2018): 137–64. <https://doi.org/10.1080/14794012.2018.1450922>.

<sup>141</sup> Christian Leuprecht, Joel Sokolsky, and Jayson Derow. “Paying It Forward: Canada’s Renewed Commitment to NATO’s Enhanced Forward Presence.” *International Journal* (Toronto) 74, no. 1 (2019): 162–71. <https://doi.org/10.1177/0020702019834887>.

<sup>142</sup> Joel Sokolsky. “Realism Canadian Style: National Security Policy and the Chrétien Legacy.” *Policy Matters* 5 (2) 2004. <http://irpp.org/wp-content/uploads/assets/pmv05no2.pdf>

<sup>143</sup> Henry Kissinger. “White House Years.” (Boston: Little Brown, 1979), 383. Cited in Joel Sokolsky. “Realism Canadian Style: National Security Policy and the Chrétien Legacy.” *Policy Matters* 5 (2) 2004. <http://irpp.org/wp-content/uploads/assets/pmv05no2.pdf>

<sup>144</sup> Phillip Lagassé and Paul Robinson. “Reviving Realism in the Canadian Defence Debate.” *Martello Paper Series*. Centre for International Relations, Queen’s University. Kingston, Ontario, Canada 2008. Page 4.

<sup>145</sup> Hans J. Morgenthau. “Politics Among Nations: The Struggle for Power and Peace.” Boston: McGraw-Hill 1993. Page 174.

is not more important than economic strength in maintaining or developing national power, and that Canada should be satisfied with playing a “token role” in multinational military operations if that is what is required to satisfy security concerns and other competing priorities.<sup>146</sup> Given Canada’s stature, geography and relative safety, Lagassé and Robinson ask if being a ‘contender’ on the global stage is really worth the cost.<sup>147</sup> Canada must be able to participate in overseas missions to prove to the US and NATO that it is a worthy member. Canada’s missions in the former Yugoslavia, Afghanistan and more recently in Latvia, Ukraine and Iraq represent Canada contributing internationally to maintain a place at the table. Canada must balance this need to deploy with limited personnel and equipment and the risk of overstretching forces. Canada’s deployment to Kandahar for example greatly reduced the army’s ability to respond to another threat or provide support to civil authority during domestic operations.

### **Canadian “Easy Riding”**

Joel Sokolsky termed Canada an “easy rider” in defence policy.<sup>148</sup> Canada has historically been charged, mostly by Canadians, with freeriding off its alliance with the US and NATO. To refer to Canada as a free rider would ignore the many international military operations which the Canadian Armed Forces has participated in or led. Canada’s lack of spending commitment is offset by Canada’s contributions in terms of frequent troop deployments and other forms of international assistance toward NATO missions or in support of NATO goals. The same could be said for other NATO allies. In Fall 2022, Italy and Germany were both in command of NATP eFP battlegroups as Framework nations while spending less than the 2% of GDP on defence. Expensive is not always better. It is not immediately clear that any given country is more secure by spending more money on defence. Sokolsky challenges, “it is not entirely self-evident that allocating more wealth to the Canadian Forces, especially for US-led multinational operations overseas, will give Ottawa the kind of standing and influence that many analysts are convinced should be the case.”<sup>149</sup> According to Parkinson’s Law: “work expands so as to fill the time available for its completion.”<sup>150</sup> With more money, the Department of National Defence will find more work. Spending money does not always or necessarily train new soldiers or fix immediate procurement issues or prevent exhausting deployed soldiers and equipment. In a resource-constrained environment, governments must balance the amount of money apportioned to defence against many other competing priorities. Joel Sokolsky recommends Canada spends “just enough” on defence arguing Canada needs only to spend “enough to reduce the need for an American presence in Canada, and just enough, as well, to secure the Canadian seat in Allied councils.”<sup>151</sup>

### **Canadian National Pride, Values and Foreign Policy**

The most critical of Canadian defence spending are Canadians themselves due to a collective anxiety about allied criticism particularly criticism coming from the US about Canadian burden-sharing in NATO’s collective defence. This explains Canada’s leadership in Latvia and Ukraine after 2014. While Canada’s contributions are always welcome, they are not a high priority for US and NATO security agendas. However in Afghanistan, Canada’s willingness to deploy its forces in high-risk areas without caveats was recognized as the importance of qualitative contributions is not lost in Washington and Brussels. Critics of Canada’s defence expenditures charge Canada with disgracing its once highly effective and widely respected armed forces which took on larger responsibilities than today. J.L.

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<sup>146</sup> Lagassé and Robinson, 8-10.

<sup>147</sup> Ibid, 4.

<sup>148</sup> Sokolsky, 11.

<sup>149</sup> Sokolsky, 20.

<sup>150</sup> C. Northcote Parkinson. “Parkinson’s Law.” *The Economist*. November 1955.

<https://www.economist.com/news/1955/11/19/parkinsons-law>

<sup>151</sup> Joel Sokolsky. “A Seat at the Table: Canada and its Alliances.” *Armed Forces and Society* 16 1989. Page 14.

Granatstein and Andrew Cohen have both argued that Canada's influence and standing has suffered because of the relative decline in its level of defence spending since the Korean War.<sup>152</sup> This perspective, however, unrealistically diminishes the importance Canada made to the NATO and UN missions Canada has participated in in the second half of the 20<sup>th</sup> century and into the first two decades of the 21<sup>st</sup>. Prime Minister Stephen Harper referred to Canada as a "fighting country". Similarly, his Chief of the Defence Staff, General Rick Hillier, called the Canadian people a "warrior nation". Some authors tie Canada's national pride to its foreign policy or to the degree that Canada is visible in the world. Michael Ignatieff and Granatstein argued that a strong military is required to maintain sovereignty. Ignatieff argued "Canada made the mistake of assuming that we could have sovereignty without substantial military expenditure."<sup>153</sup> Granatstein also argued "It's long past time for Canadians to act like a sovereign nation. That means having a substantial military."<sup>154</sup> Those authors critical of Canada's defence expenditures are typically the first to identify that Canada does not commit 2% of its GDP to defence spending and recommends that Canada should increase its spending. Andrew Cohen argues that Canada should contribute more money as a share of GDP than the bottom 1/3 of NATO members but less than the top 1/3.<sup>155</sup> Ardent supporters of an increased defence budget also include Sean Maloney, Gordon Smith, Denis Stairs, and former Senator Hugh Segal. To some, national pride is decided by military strength and contribution internationally to multinational military operations. These analysts draw a direct connection between defence spending and Canada's sovereignty.

### **Canadian Values and Interests in Ukraine**

Realist authors demand placing genuine interests above national pride. Roy Rempel defines Canadian interest as "those interests associated with the continuation of the Canadian state, the society that it protects, and the Canadian way of life."<sup>156</sup> Both Granatstein and Rempel argue that Canada's foreign policy is overly vague with little definition of what it means to spread Canadian values abroad. These authors are critical of Canada's tendency to promote ill-defined values instead of pursuing defined interests. Basing their work in the neo-classical realist approach, Bohdan Kordan and Mitchell Dowie argue that the liberal internationalist and political realist approaches fail to describe Canada's foreign policy in Ukraine. They support a values-based approach to foreign policy and argue instead that Canada responded in Ukraine to demonstrate opposition to Russia's threats to the international rules-based order which Canada has helped build and aligns itself.<sup>157</sup> Ukrainian scholar of Canadian studies Oleh Kozachuk also supports the argument that Canada's foreign policy in Ukraine is essentially values-based and driven by a desire to maintain the liberal rules-based international order.<sup>158</sup>

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<sup>152</sup> J.L. Granatstein. "Who Killed the Canadian Military." Toronto: Harper Collins 2004. And Andrew Cohen. "While Canada Slept: How We Lost Our Place in the World." Toronto: McClelland & Stewart 2004.

<sup>153</sup> Michael Ignatieff cited in Cohen, 2004. Page 26.

<sup>154</sup> J.L. Granatstein cited in Cohen, 2004. Page 34.

<sup>155</sup> Cohen, 170.

<sup>156</sup> Roy Rempel. *Dreamland: How Canada's Pretend Foreign Policy has Undermined Sovereignty*. Kingston: Queen's School of Policy Studies 2006. 158

<sup>157</sup> Bohdan Kordan and Mitchell Dowie. "Canada and the Ukrainian Crisis." McGill-Queen's University Press 2020.

<sup>158</sup> Oleh Kozachuk. 2017. "Ukraine in Canadian Foreign Policy After 2014." *TransCanadaiana. Polish Journal of Canadian Studies* 9: 305-321.

### **Chapter 3. Canadian Foreign Policy Perspectives in Ukraine**

Foreign policy is dependent on public support. However, in the absence of a major crisis, Canadian voters like most Westerners are indifferent to foreign affairs. Canadian federal election issues are primarily domestic in nature as foreign policy has little direct and palpable impact on the day-to-day life of the Canadian voter. Henry Kissinger warned that “No foreign policy – no matter how ingenious – has any chance of success if it is born in the minds of a few and carried in the hearts of none.”<sup>159</sup> Foreign policy requires support to succeed, but it is often met with ambivalence during election time. Despite this ambivalence to foreign policy at the voting booth, Canadian culture clings onto a certain image of the Canadian Armed Forces and the role of Canada globally engaged as peacekeepers, friendly neighbours, and resolute allies. The Chapters’ bookstore slogan, “the world needs more Canada” has become a rallying cry for those nostalgic of a Canada more engaged in the world. Operations evolve over successive rotations, but the Government of Canada’s higher objective of international engagement remains.

The 2015 election polls indicated a small but growing dissatisfaction in Canada’s foreign policy.<sup>160</sup> This seemed to suggest that for successive Canadian governments; attention must be paid to Canada’s image in the world. Until the 2022 invasion, there was little academic study of Canada’s foreign policy objectives and perspectives in Ukraine or study of the security sector reform and SFCB conducted by deployed members of the Canadian Armed Forces. While the deteriorating security situation in Ukraine is relatively recent, Canadian foreign and defence policy there generally reflects a few long-held perspectives on international relations. First, Canadian foreign policy and defence policy is foremost multilateralist and led by the US. As noted, Canada’s capacity building in Ukraine, although officially bilateral, was NATO/US coordinated operation as member countries on the MJC coordinated efforts through the MCC in Kyiv. Second, Canada exports liberal values. Canada proudly views itself as an early signatory to the UN, a founding member of NATO, a multilateral intervener and staunch supporter of liberal democracy and the rules-based international order. When such values are threatened, Canada reacts. This fact at least partially explains Canada’s presence in Ukraine and the work done there to support democracy and the Ukrainian economy multilaterally with partners and allies. Third, Canada will spend what it can to contribute to allied efforts but no more than necessary. Canada is an efficient contributor spending just enough to maintain close relations and alliance.

Canada’s foreign policy in Ukraine can be analyzed by six main approaches: neo-classical realist, liberal internationalist, Atlanticist, neo-continentalist, diaspora and “expeditionary expediency”. The neo-classical realist approach looks at both the external pressures of the international system and the Innenpolitik experienced within Canada to study Canada’s contribution in Ukraine arguing that Canadian commitments in Ukraine can be described as a response to the legitimate Russian security threat nested within the international framework and subject to internal pressure such as budget and domestic politics. The liberal internationalist approach views Canada’s foreign policy as based upon a need to defend the liberal world order such as from Russia’s assaults (incursion into sovereign territory, annexations, etc.). The neo-continentalist approach views Canada’s efforts in Ukraine as necessary to demonstrate to the US that Canada is engaged in the world in support of shared American and Canadian interests and values and thus remains a valuable and trusted ally. The diaspora approach analyzes the impact the Ukrainian diaspora in Canada has on foreign policy. The “expeditionary expediency” approach views Canada’s commitment to Ukraine as a demonstration to the international community that Canada remains a worthwhile partner willing to put boots on the ground in support of allied values and objectives despite

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<sup>159</sup> Henry Kissinger. “Kissinger Urges Bipartisan Policy.” *The New York Times*, August 3, 1973. <https://www.nytimes.com/1973/08/03/archives/kissinger-urges-bipartisan-policy-asks-that-watergate-not-cut-unity.html>.

<sup>160</sup> Angus Reid Institute. 2015. Election 2015: Canadians profess decline in international reputation in last decade by margin of 2:1. Angus Reid Institute, September 28. <http://angusreid.org/election-2015-foreign-policy/>.



having a small defence budget compared to similarly sized countries. These approaches to the study of Canada's engagement in Ukraine are presented and analyzed below. This study argues that ultimately Canada's mission in Ukraine was a demonstration to the international community by the Government of Canada that Canada is still relevant on the international stage and worthy of partnership despite low spending commitments.

### **Canadian Neo-Classical Realism in Ukraine**

Russia's annexation of the Crimean Peninsula was the first time a country invaded and annexed sovereign territory of another country in Europe since the Second World War. This action destabilized Europe and constituted a threat to European security which Canada holds as its own. Russian dissatisfied historical revisionism and rejection of the international political order constituted a major disruptive change in international politics and changed the international system or framework within which Canada and the rest of the world operates. The neo-classical realist approach looks at both foreign policy and international politics as external stimuli which shaped Canada's decision to deploy to Ukraine. As Gideon Rose, recognized as having coined the term "neo-classical realist", wrote in *World Politics* in 1998 neo-classical realists "argue that the scope and ambition of a country's foreign policy is driven first and foremost by its place in the international system and specifically by its relative material power capabilities."<sup>161</sup> This approach also factors the internal influences which shaped Canada's policy response which Rose terms as "intervening variables". Norrin Ripsman, Jeffrey Taliaferro and Steven Lobell identify four intervening variables in their book *Neoclassical Realist Theory of International Politics*: leader images, strategic culture, state-society relations and domestic institutions.<sup>162</sup> Bohdan Kordan and Mitchell Dowie in their book *Canada and the Ukrainian Crisis* use the neo-classical realist approach to argue that Canada's engagement in Ukraine was consistent with historical political and security interests and aimed at addressing troubles in the international order due to Russia's departure from the 21st century global norms while subject to intervening variables specifically Prime Minister Harper's leadership, politics and worldview.<sup>163</sup>

Although helpful, the neo-classical realist approach places too much emphasis on Canada's own grand strategy and ability to wield resources internationally. As argued in this thesis, Canada is reactive following an emergent strategy following fast unfolding international events, and while Canada does not simply follow its allies into their foreign policy responses, Canada does not have the resources or political weight to deploy alone. In Ukraine, Canada's qualitative commitment was appreciated but only because it was undertaken alongside allies and partners specifically the US. Canada saw an opportunity in Ukraine in 2015 to deploy a cheap mission to Ukraine alongside its American and British allies as an inexpensive commitment to alliance and the liberal world order. Canada's deployment to Ukraine more opportunistic than strategic.

### **Canadian Liberal Internationalism in Ukraine**

The Russian invasion and Annexation of Crimea was perceived by the Canadian government as an affront against the liberal world order in place since the end of the Second World War, an attack specifically on the UN Charter, and a threat to NATO allies. The liberal international perspective of Canada's engagement in Ukraine focuses on Canada's motivation to protect the rules-based liberal world order threatened by the Russian Federation's illegal annexation of territory while guaranteeing Canada a

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<sup>161</sup> Gideon Rose. "Neoclassical Realism and Theories of Foreign Policy." *World Politics* 5.1 (October 1998): 146

<sup>162</sup> Norrin M. Ripsman, Jeffrey W. Taliaferro, and Steven E. Lobell. *Neoclassical Realist Theory of International Politics*. New York, NY: Oxford University Press, 2016. Page 59

<sup>163</sup> Kordan and Dowie

place on the international stage in the process. Canada's history with exporting liberal internationalism extends back to the years immediately following World War II. Secretary of State for External Affairs Louis St Laurent declared in 1947 that Canada's foreign policy would reflect the Canadian values of liberty, democracy and human rights exported through multilateral intervention.<sup>164</sup> Canada was one of the original signatories to the UN, a founding member of NATO, is a leading member in the Organization for Economic Cooperation and Development (OECD), the Organization for Security and Cooperation in Europe, the G7 and close partner to the ultimate liberal power, the US, through the United States Mexico Canada trade agreement and the North American Aerospace Defence Command (NORAD).<sup>165</sup> As written in the current Canadian defence policy *Strong, Secure, Engaged*, "Canada has a strong interest in supporting the international system it helped to build".<sup>166</sup> While Canadian values are difficult to list, the 2009 National Defence publication *Duty with Honour* describes these Canadian values as fundamental to military operations. Drawn from the *Constitution Act* 1982 and the *Charter of Rights and Freedoms* these values include: "the democratic ideal, the concept of peace, order and good government, the rule of law, and the strength to be drawn from diversity."<sup>167</sup> The Government of Canada officially supports Ukraine's goals for Euro-Atlantic integration and supports securing "Ukraine's future as a democratic, rules-based state that delivers security, prosperity and freedom for all of its citizens."<sup>168</sup> Since 2014, Canadian values have been reinforced in Ukraine by the Government of Canada through various means- democracy through election monitoring, sustainable economic growth through trade agreements, humanitarian assistance through the UN and Red Cross and through direct support from Canada, defence and security through the Canadian Armed Forces Op UNIFIER, peace and stabilization and rule of law through the Canadian Police Mission in Ukraine (CPMU) and Canada-Ukraine Police Development Project (CUPDP).

Canada's liberal internationalism in Ukraine is motivated too by, to quote Joel Sokolsky's phrase, Canada's pursuit of a "seat at the table".<sup>169</sup> Sokolsky identified that despite Canada's small stature in terms of military or economic capability on the international stage, it expends a great deal of diplomatic effort to be present in alliances, organizations and councils that deal with global security and economic issues. Canada's liberal internationalism is defined by its pursuit of multilateral intervention in support of key values. During the Ukraine crisis, Canada volunteered to lead NATO's eFP battle group in Latvia and helped found the MJC in Kyiv to support Ukrainian Security Sector Reform with other NATO member countries to demonstrate Canadian commitment to European security. Former Prime Minister Stephen Harper at the onset of the crisis in Ukraine was more vocal than other world leaders in his criticism of Russia and particularly against Mr. Putin. Harper addressed the ship's company of HMCS Fredericton as it sailed in Baltic Sea during a NATO maritime assurance mission in 2015 exclaiming, "Mr. Putin's recklessness threatens global stability, regional stability, and has spread fear among our Eastern allies. That, my friends, is why you, the men, and women of the Royal Canadian Navy, are here."<sup>170</sup> Harper's

<sup>164</sup> David Dewitt and John Kirton, *Canada as a Principal Power* (Toronto: John Wiley & Sons, 1983).

<sup>165</sup> John Hilliker and Donald Barry, *Le ministère des affaires extérieures du Canada, Volume II: L'essor (1946–1968)* (Québec: Presses de l'Université Laval et Institut d'administration publique du Canada, 1995). Page 32. and W. Donald Macnamara and Joseph T Jockel. "No Boundaries Upstairs: Canada, the United States, and the Origins of North American Air Defence 1945-1958." *International Journal* 44, no. 2 (1989): 513–15. <https://doi.org/10.2307/40202611>. and D. F. Hollman, *NORAD in the New Millennium* (Toronto: Canadian Institute of International Affairs, 2000).

<sup>166</sup> Government of Canada, Department of National Defence. 2017. *Strong, Secure, Engaged: Canada's New Defence Policy*, 50, 91.

<sup>167</sup> Government of Canada. Department of National Defence. 2009. *Duty with Honour*. <https://www.canada.ca/en/department-national-defence/corporate/reports-publications/duty-with-honour-2009/chapter-2-statement-of-canadian-military-ethos/section-3-canadian-values.html>

<sup>168</sup> Government of Canada. *Canada's engagement in Ukraine*. February 16, 2021. <https://www.international.gc.ca/world-monde/country-pays/ukraine/relations.aspx?lang=eng>

<sup>169</sup> Sokolsky. (1989).

<sup>170</sup> Susan Lunn, "Russian ships track HMCS Fredericton Carrying Stephen Harper," *CBC News*, 10 June 2015, <https://www.cbc.ca/news/politics/russian-ships-track-hmcs-fredericton-carrying-stephen-harper-1.3107649>

statement reflected both Canada's commitment to collective security and the need to demonstrate to the world that Canada will intervene in defence of the global stability afforded by the liberal international system. Following the 2015 election, Prime Minister Justin Trudeau's blend of liberal idealism and interest-based realism saw two extensions of Op UNIFIER based on continuing its intervention in support of Ukraine as the stagnated conflict in Ukraine's Donbas continued.<sup>171</sup>

## Canada's Atlanticism, Europe and NATO

Canada's foreign policy remains significantly Euro-Atlantic and driven by commitments to NATO. Canada uses NATO as a means of achieving multilateralism and maintaining a "seat at the table." For the duration of the Cold War, Canada's foreign policy was geared toward Europe as a founding member of NATO. With the collapse of the principal threat, the USSR, and the end of the Cold War, Canadian defence spending, as with that of other allies, decreased. However, Canada did not back down on its commitments to NATO missions. After the collapse of the USSR, Canada deployed military personnel on NATO missions to Bosnia and Herzegovina in 1995, Kosovo in 1999, Afghanistan 2001-2014, and Libya in 2011. Following Russia's annexation of Crimea, Canada joined the US and UK to create the MJC and committed military trainers to assist Ukraine's integration into NATO and volunteered to lead NATO's eFP in Latvia in 2017. In 2019, Canada took command of the NATO training mission in Iraq.<sup>172</sup>

Canada is a NATO expansionist country.<sup>173</sup> Ottawa supported the expansion of NATO membership beyond Western Europe and contributed to missions outside of Euro-Atlantic geography.<sup>174</sup> Canadian contributions to NATO missions in Afghanistan and Libya far away from the North Atlantic area of operations (AO) demonstrated Canada's support of NATO commitments beyond the old North Atlantic region. Canada relies on NATO as one of its chief instruments of foreign policy and therefore must make a real contribution to NATO.<sup>175</sup> Canada's expansionism can be observed in its engagement in Ukraine's Membership Action Plan and through the SSR and SFCB which targeted Ukraine's integration into NATO. Canadian military trainers deployed on Op UNIFIER worked closely with Ukrainian academies, training centres and schools to prepare them not only for combat operations but also for NATO observers who assess them. Op UNIFIER's liaison officers worked closely with NATO liaison in Ukraine and NATO's Defence Education Enhancement Program (DEEP). A recurring theme throughout successive rotations of Op UNIFIER has been preparation of Ukrainian security forces for Ukrainian membership in NATO.

A significant indicator that Canada is anchored in the North Atlantic region can be seen in the extent to which Canada has not significantly shifted efforts to meet the rising Chinese threat in Asia-Pacific. Despite the US's slow shift toward the Asia-Pacific region, Canada is firmly rooted in Europe and the North Atlantic. Canada was not included in the recent Australia, United Kingdom, United States (AUKUS) security arrangement with these Five Eyes allies despite its lengthy Pacific coast. Canada's limited commitments to Asia-Pacific is due in part to its firm roots in the North Atlantic and Europe.

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<sup>171</sup> Roland Paris. "The Promise and Perils of Justin Trudeau's Foreign Policy" in Hillmer, Norman, and Philippe Lagassé. *Canada Among Nations 2017: Justin Trudeau and Canadian Foreign Policy*. Cham, Switzerland: Palgrave Macmillan, 2018.

<sup>172</sup> Government of Canada. Prime Minister of Canada. "Canada's Leadership in Iraq." July 11, 2018. <https://pm.gc.ca/en/news/backgrounders/2018/07/11/canadas-leadership-iraq> and Government of Canada. Prime Minister of Canada. "Canada to assume command of new NATO training mission in Iraq." July 11, 2018. <https://pm.gc.ca/en/news/news-releases/2018/07/11/canada-assume-command-new-nato-training-mission-iraq>

<sup>173</sup> See Government of Canada. *Canada and the World*. "Canada and the North Atlantic Treaty Organization." May 19, 2021. [https://www.international.gc.ca/world-monde/international\\_relations-relations\\_internationales/nato-otan/index.aspx?lang=eng](https://www.international.gc.ca/world-monde/international_relations-relations_internationales/nato-otan/index.aspx?lang=eng)

<sup>174</sup> Tobias Bunde and Timo Noetzel. "Unavoidable Tensions: The Liberal Path to Global NATO." *Contemporary Security Policy* 31, no. 2 (2010): 295–318. <https://doi.org/10.1080/13523260.2010.491380>.

<sup>175</sup> Douglas L. Bland, "A Sow's Ear from a Silk Purse," *International Journal* 54, no. 1 (Winter 1998–99): 149

However, while not in AUKUS, Canada is contributing to US efforts in the Pacific through ship deployments.<sup>176</sup> Canadians perceive the North Atlantic alliance as the main driver of Canadian foreign policy. Canada's "Atlanticism" causes Canada to see its foreign policy in terms of US and Western European powers with less regard to China and the rest of Asia. Although many authors including Kim Richard Nossal would consider Canada's lack of engagement in Asia-Pacific problematic, Canada has a real opportunity to relieve some pressure from the US in Europe while the Americans shift focus to the South China Sea. America's presence in Ukraine was concentrated in the far West of the country, but Canadian troops trained in almost every Oblast in Ukraine. The limited American troop presence in Ukraine was an opportunity for Canada to show leadership. However, calls for Canada to devote more attention to the Indo-Pacific region have been heard for nearly a decade now.<sup>177</sup> The issue facing Canada prior to the 2022 invasion is whether its long-standing expeditionary strategic culture should also lead to a "re-balancing" towards the Asia-Pacific region.

If the Biden administration continues to look to NATO allies to assume more of the burden in the Pacific, Ottawa might well see an opportunity to further reduce Canada's own burden, by shifting its NATO emphasis to the Pacific. Such a commitment would only require the occasional participation in multilateral maritime exercises with Canada-based naval and air forces (which it has done for years). Combined with modest increases in NORAD and broader North American security efforts, Ottawa would satisfy already low US expectations, even if it meant easing away from its traditional Euro-Atlantic focus. However, following Russia's invasion of Ukraine, the opposite has occurred as resources have poured into Europe to boost NATO deterrence measures and support Ukrainian forces.

With NATO allies such as the US and the UK, turning their attention to the Pacific area, security gaps remained in Europe. Indeed, Russia saw in the Alliance's pivot, an opportunity to increase pressure on Baltic allies and especially in Ukraine. In these areas the Canadian contribution, though small relative to NATO's overall collective military power, was comparatively very important to sustaining the immediate mission. Moreover, as is clear from the 2022 Federal Budget, Ottawa is not planning to measurably increase defence spending. Even for small and middle NATO members with restricted defence budgets, in fact especially for them, a realistic strategy means hard choices, beginning with "the prioritization of goals by assignment of resources."<sup>178</sup> Thus it might be argued that Canada should not follow other allies in devoting more of continually scarce defence resources to the Indo-Pacific region, but rather sustain its commitments in the Euro-Atlantic region in the Baltics and Ukraine, where they continued to be needed, especially since February 2022. Combined with the limited, but still relatively costly, demands that will be unavoidably required for NORAD modernization and improvement in Arctic security, Ottawa will be hard pressed to maintain a just enough defence posture without the additional burden of a greater commitment in the Indo-Pacific region.

### **Neo-Continentalism**

A great defining feature of Canada's defence policy is its relationship with the US. As former Prime Minister Stephen Harper puts it, "Canada's greatest asset on the international stage is our unique relationship with the United States – and the fact that we just happen to share values and interests with the

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<sup>176</sup> Reuters. "U.S. and Canadian Warships Sailed Through Taiwan Strait Last Week." CNBC, October 17, 2021.

<https://www.cnbc.com/2021/10/17/us-and-canadian-warships-sailed-through-taiwan-strait-last-week-.html>.

<sup>177</sup> See, Thomas Adams, "Shift to the Pacific: Canada's Security Interest and Maritime Strategy in East Asia," David S. McDonough, Ed., *Canada's National Security in the Post 9/11 World: Strategic Interests and Threats*, (Toronto: University of Toronto Press, 2012).

<sup>178</sup> Friedman. (2017).

world's sole superpower."<sup>179</sup> Because American and Canadian values are in many ways similar, Canadians have been comfortable in joining the US on operations defending certain shared values. Justin Massie and Srdjan Vucetic argue that Canada's relationship to the US is an example of how ideology and alliance matter more than war materials in determining threat.<sup>180</sup> The US is a massive military power and borders close to Canadian population centres yet does not pose a threat to Canada. For the first 70 years of Canada's confederation, Canada's foreign policy was determined by its place as part of the British Empire. Starting in the 1930s, Canada's continentalist approach began to solidify with a solidified defence alignment with the US (1940 Ogdensburg declaration, Permanent joint Board on Defense, 1947 Joint Declaration on North American Defense Cooperation). Despite the US's intertwined history and shared values with Canada, Canada has some concerns on the matter of continental defence because of the issue of sovereignty.<sup>181</sup> Massie and Vucetic identified a dichotomy in Canada's strategic relationship with the US: "Canada as a sovereign state and Canada as a reliable ally of the United States".<sup>182</sup> Analysts more cautious about Canada's defence relationship with the American superpower argue that the "fortress North America" mentality expecting the US to defend Canadian territory is tantamount to sacrificing sovereignty by giving up the sovereign state responsibility of home defence.<sup>183</sup> Minister of Foreign Affairs Chrystia Freeland spoke to Canada's relationship with the US in her address to the House of Commons on Canada's foreign policy priorities in June 2017:

To rely solely on the U.S. security umbrella would make us a client state. And although we have an incredibly good relationship with our American friends and neighbours, such a dependence would not be in Canada's interest. That is why doing our fair share is clearly necessary. It is why our commitment to NORAD, and to our strategic relationship with the United States, is so critical. It is by pulling our weight in this partnership, and in all our international partnerships, that we, in fact, have weight.<sup>184</sup>

Canada's foreign policy is defined by its ability to pull its own weight on the international stage. President Obama played to Canada's need to impress the US during his 2016 address to Canada's House of Commons saying, "The world needs more Canada. NATO needs more Canada. We need you."<sup>185</sup> Canada balances its commitments as a beneficiary of American security on the North American continent without sacrificing its sovereignty. Canada deploys troops abroad as part of multinational forces as a show of relevance to the US and NATO allies. Canada does not have the capacity to match the expenditures of United States Northern Command (USNORTHCOM) in defence of North America nor the political will to do so. Therefore, Canada also contributes overseas to military operations with the United States to prove that Canada is a worthy, reliable ally.

Consistent with this approach, Canada's first response to Russia's incursions was to support American sanctions. On March 17, 2014, Canada officially sanctioned Russia under the Special Economic Measures Act.<sup>186</sup> By August 2014 Canada delivered non-lethal military aid, and by April 2015,

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<sup>179</sup> Quoted in Justin Massie and Stephane Roussel. "The Twilight of Internationalism? Neocontinentalism as an Emerging Dominant Idea in Canadian Foreign Policy," in *Canada in the World: Internationalism in Canadian Foreign Policy*, ed. Heather A. Smith and Claire T. Sjolander (Don Mills, ON: Oxford University Press, 2013), 48.

<sup>180</sup> Massie and Vucetic. (2020).

<sup>181</sup> DeNeen L. Brown, "Canada Wary of U.S. Anti-Terror Plan: Some Fear a Continental Defense System Would Threaten Ottawa's Sovereignty," *Washington Post*, 24 February 2002.

<sup>182</sup> Massie and Vucetic. (2020). Page 35.

<sup>183</sup> Andrew Cohen. "While Canada Slept: How We Lost Our Place in the World." (Toronto: McClelland Stewart, 2003).

<sup>184</sup> Chrystia Freeland. "Address by Minister Freeland on Canada's foreign policy priorities." Global Affairs Canada. June 6, 2017. [https://www.canada.ca/en/global-affairs/news/2017/06/address\\_by\\_ministerfreelandoncanadasforeignpolicypriorities.html](https://www.canada.ca/en/global-affairs/news/2017/06/address_by_ministerfreelandoncanadasforeignpolicypriorities.html)

<sup>185</sup> Barack H Obama. "Remarks to the Parliament in Ottawa, Canada." Daily Compilation of Presidential Documents, 2016.

<sup>186</sup> Government of Canada. Canadian Sanctions Related to Russia. April 23, 2021. [https://www.international.gc.ca/world-monde/international\\_relations-relations\\_internationales/sanctions/Russia-Russie.aspx?lang=eng](https://www.international.gc.ca/world-monde/international_relations-relations_internationales/sanctions/Russia-Russie.aspx?lang=eng)

200 Canadian military trainers started training the security forces of Ukraine as part of Op UNIFIER alongside the American Joint Multinational Training Group – Ukraine out of the International Peace Support Centre in Yavoriv, Ukraine.<sup>187</sup> Furthermore, as explained, the MCC was led by a US Colonel and the COS was a Canadian Major demonstrating Canada’s leadership initiative and close partnership with the US on the international stage.

## Diaspora Debate

Canada’s multiculturalism and freedom of expression and association enables political mobilization of large immigrant diaspora in Canada when political situations deteriorate in the mother country. Larger more organized diasporas can lobby the Government of Canada for aid to the country. Canada has the second largest Ukrainian diaspora after Russia. Ukrainian-Canadians are proud of the many successful and influential Ukrainians in Canadian society. Former Senator and Ukrainian-Canadian Paul Yuzyk has been hailed the father of multiculturalism in Canada, a value now deeply entrenched in Canadian society since the *Canadian Charter of Rights and Freedoms* of 1982.<sup>188</sup> Ukrainian-Canadians have produced famous entertainers including the late Alex Trebek and athletes including Wayne Gretzky, Tyler Bozak and Jordin Tootoo, soldiers including Lieutenant General Paul Wynnyk and Victoria Cross winner Corporal Filip Konowal, politicians including Deputy Prime Minister Chrystia Freeland, Governors General including Edward Schreyer and Ray Hnatyshyn, and astronauts Joshua Kutryk and Roberta Bondar. Jewish Canadians also contributed greatly to the revival of Jewish religious and communal life in Ukraine after the end of the Cold War.

Ukrainian diaspora was active in Canada in the early days of the USSR when Ukrainian immigrants brought to Canada Anti-Soviet political views following their experiences during the Holodomor and the Stalinist purges. During the Cold War, though, Ottawa was not always sympathetic to lobbying by Ukrainian Canadians in favour of a hard line on the USSR. In the early 1970s, the government of P.E. Trudeau supported the prevailing western détente policies and appeared anxious to move beyond Cold War rhetoric.

When asked in the early seventies by reporters about his attitude to the persecution of Ukrainians by the Soviet government, [Prime Minister Pierre Eliot] Trudeau replied that "anyone who breaks the law in order to assert his nationalism doesn't get much sympathy from me ... I didn't feel like bringing up any case [with Soviet leaders] which would have caused Mr. Brezhnev or Mr. Kosygin to say ... 'Why should you put your revolutionaries in jail and we shouldn't put ours?'" Needless to say, this caused an uproar in the Canadian Ukrainian community - no doubt much to the delight of Soviet observers, though this was never openly expressed.<sup>189</sup>

Ukrainian-Canadian activism sharply increased during the Euromaidan protests of 2013. The diaspora effected by deeply rooted traumas of the Soviet times was very much supportive of Ukraine’s Euro-Atlantic integration and separation from Moscow.<sup>190</sup> Activism in support of the Euromaidan was channeled through lobbying, remittances, protests for social and human rights, production of media and

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<sup>187</sup> Kordan and Dowie. (2020). page 59. And US Army. “Joint Multinational Training Group-Ukraine.” 7th Army Training Command, n.d. <https://www.7atc.army.mil/JMTGU/>.

<sup>188</sup> See Ukrainian Canadian Congress. News. “Happy Canadian Multiculturalism Day 2017!” <https://www.ucc.ca/2017/06/27/happy-canadian-multiculturalism-day-2017/>

<sup>189</sup> Leigh Sarty, “A Handshake Across the Pole: Canadian-Soviet Relations During the Era of Détente,” in David Davies, Ed., *Canada and the Soviet Experiment: Essays on Canadian Encounters with Russia and the Soviet Union, 1900-1991* (Toronto, Centre for Russian and East European Studies (University of Toronto) and Centre on Foreign Policy and Federalism (University of Waterloo), 1994, FN 37, p.133)

<sup>190</sup> Milana Nikolko. 2019. “Diaspora Mobilization and the Ukraine Crisis: Old Traumas and New Strategies.” *Ethnic and Racial Studies* 42 (11): 1870–1889.

even legal efforts.<sup>191</sup> From November 2013 to February 2014 there were twenty Euromaidan peaceful protests in Canada.<sup>192</sup>

The Ukrainian Canadian Congress (UCC) has been a powerful voice in support of Ukraine's Euro-Atlantic integration since 2013. The UCC was instrumental in pushing Canada's foreign policy toward supporting democratic reforms in Ukraine deploying members to monitor elections after 2014.<sup>193</sup> On the economic and trade fronts, the UCC supported the Canada Ukraine Free Trade Agreement which came into effect August 2017. The National President of the UCC Alexandra Chyczij wrote in her triennial report:

The ban on selling defensive weapons from Canada to Ukraine was lifted. Canada's military training mission in Ukraine, Op Unifier, was extended until 2022. Canada announced new funding, totalling tens of millions of dollars, to support Ukraine's democratic development. None of these accomplishments would have been possible without the strength of a community speaking loudly with a strong, united voice.<sup>194</sup>

Ukrainian-Canadian activism has also supported Canadian military efforts in Ukraine. Pre-deployment cultural and historical briefings for Canadian Armed Forces members deploying to Ukraine feature some prominent members of the Ukrainian diaspora in Canada. There are also Ukrainian-Canadian members of the Canadian Armed Forces who deploy on Op UNIFIER both as trainers and as linguists. Ukrainians today are aware of the large diaspora in Canada, and some can name a connection to Canada through family who emigrated. The Russians too are aware of and threatened by the diaspora in Canada and the Western, liberal views of this community which run counter to Russian interests. Russian Minister of foreign affairs Sergei Lavrov charged that Harper's Government "headed the requirements of rabid representatives of the Ukrainian Diaspora."<sup>195</sup> Such attention from Putin's cabinet demonstrates the impact the diaspora has had.

### **Expeditionary Expediency**

The preceding sections on Canada's neo-classical realism, liberal internationalism, continentalism, and diaspora politics and Atlanticism portray the key motivations behind Canada's foreign policy, but it is Canada's "expeditionary expediency" that actualizes Canada's commitments to its values and alliances. Canada's foreign policy is defined by its position as an alliance member. The Canadian Armed Forces is employed by the federal government, as Christian Leuprecht and Joel Sokolsky have termed, as "an instrument of alliance politics."<sup>196</sup> Canada's strategy of committing just enough money to stay relevant in alliances and in the international community requires the lack of spending to be offset by commitments toward military operations. As noted, Douglas Bland termed this

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<sup>191</sup> David Carment and Rachael Calleja. "Diasporas and Fragile States - Beyond Remittances Assessing the Theoretical and Policy Linkages." *Journal of Ethnic and Migration Studies* 44, no. 8 (2018): 1270–88. <https://doi.org/10.1080/1369183X.2017.1354157>. and Milana Nikolko. "Political Narratives of Victimization Among Ukrainian Canadian Diaspora." in Carment, David, and Ariane Sadjed. *Diaspora As Cultures of CoOp: Global and Local Perspectives*. Cham: Springer International Publishing AG, 2017.

<sup>192</sup> David Carment, Milana Nikolko, and Sam MacIsaac. "Mobilizing Diaspora During Crisis: Ukrainian Diaspora in Canada and the Intergenerational Sweet Spot." *Diaspora Studies* 14, no. 1 (2021): 22–44. <https://doi.org/10.1080/09739572.2020.1827667>.

<sup>193</sup> Kozachuk. (2017).

<sup>194</sup> Ukrainian Canadian Congress. News. Triennial Report. 2019. <https://www.ucc.ca/wp-content/uploads/2020/03/Triennial-report-UCC-finalfor-web-min.pdf>

<sup>195</sup> Kozachuk, 315.

<sup>196</sup> Leuprecht and Sokolsky, "Defence Policy "Walmart Style" Page 543

process a “Strategy of Commitments”.<sup>197</sup> Successive Canadian governments make commitments of money, materiel or personnel to NATO, the UN or bilaterally directly to countries receiving Canadian aid as a demonstration of Canada’s support and Canada’s relevance internationally. James McKay highlights Canada’s strategy of perception writing: “The challenge for future research will be trying to discern between a preference for being a “reliable ally” and the need to be perceived as the same to enable the pursuit of liberal internationalist goals.”<sup>198</sup> These commitments are calculated to invoke an international image of Canadian reliability subject to Canada’s budget constraints. Canada commits only 0.3% of gross national income to international assistance and 1.3% of GDP to national defence.<sup>199</sup> Canada’s comparatively low per capita defence spending has called into question the extent to which Canada can be NATO freeriding.<sup>200</sup> However, in real terms, Canada is the sixth highest spender in NATO and punches above its weight in military commitments to NATO compared to other members with a NATO common-funded budget cost-share of 6.8789%.<sup>201</sup> It is the acceptance of risk in deploying members that led Joel Sokolsky to refer to Canada as an “easy rider” rather than a free rider that gains from the collective security NATO affords at no cost.<sup>202</sup> Canada may not spend as much as expected, but this is offset by the risk Canada assumes in deploying military personnel and equipment. Canada seeks expeditionary operations to prove its worth on the international stage. Countries can share the burden of a coalition by sharing in the risk.<sup>203</sup> Canada employs what Nils Ørvik described as a “forward defence strategy” deploying troops “at the far end of [its] defence perimeter,” “where the threat seems most imminent.”<sup>204</sup> Justin Massie and Benjamin Zyla discussed this strategy and Canada’s willingness to accept risk as a contributor to NATO’s International Security Assistance Force (ISAF) in Afghanistan arguing, “the size and riskiness of Canada’s military deployments as part of the ISAF operation not only reflected Canada’s value for the alliance but also aimed at revamping the country’s international status as a leading military ally.”<sup>205</sup> In February 2004, Lieutenant General Rick Hillier of Canada led ISAF in Afghanistan, and at the time, Canada had the largest contribution of personnel to ISAF. Canada also led Regional Command South at Kandahar as of 2006 and led Op MEDUSA, at the time the largest NATO offensive against the Taliban and most significant land battle. Canada’s military commitment to NATO in Afghanistan demonstrated a serious commitment without an increase in defence budget beyond 2.0% of GDP.<sup>206</sup>

<sup>197</sup> Douglas Bland. 1998. Canada’s National Defence: Volume 2, Defence Organization. Kingston: Queen’s University School of Policy Studies 2: 407.

<sup>198</sup> James McKay. “Delivery and Canadian Military Commitments in Europe Circa 2017.” Canadian Foreign Policy Journal 24, no. 1 (2018): 39–55. <https://doi.org/10.1080/11926422.2017.1331175>.

<sup>199</sup> Government of Canada. Department of Finance. “Budget 2021.” April 19, 2021. <https://www.budget.gc.ca/2021/report-rapport/toc-tdm-en.html>. and Government of Canada. Department of National Defence. Reports and Publications. Proactive Disclosure. “Defence Funding.” February 26, 2020. <https://www.canada.ca/en/departement-national-defence/corporate/reports-publications/proactive-disclosure/supplementary-budget-b-2019-2020/other-issues/defence-funding.html#toc1>

<sup>200</sup> Jakob Odehnal. “Military Expenditures and Free-Riding in NATO.” Peace Economics, Peace Science, and Public Policy 21, no. 4 (2015): 479–87. <https://doi.org/10.1515/peps-2015-0015> and Jan Techau. “The Politics of 2 percent: NATO and the security vacuum in Europe.” Carnegie Europe. September 2015. <https://carnegieeurope.eu/2015/08/31/politics-of-2-percent-nato-and-security-vacuum-in-europe/fig> and Bob Martyn. “War-Weariness and Canadian Debates on the Use of Force: Back to Peacekeeping?” In *Going to War*, 96–113. MQUP, 2016.

<sup>201</sup> International Institute for Strategic Studies. “Chapter Ten: Country Comparisons - Commitments, Force Levels and Economics.” *The Military Balance* 116, no. 1 (2016): 481–92. <https://doi.org/10.1080/04597222.2016.1127641>. And NATO. “NATO on the Map.” NATO, March 2022. <https://www.nato.int/nato-on-the-map/#lat=23.417853223205057&lon=-92.51421647923507&zoom=-1&layer-2&layer-1&infoBox=Canada>.

<sup>202</sup> Sokolsky, “Realism Canadian style”, 11.

<sup>203</sup> See Benjamin Zyla. “Sharing the Burden: NATO and Its Second Tier Powers.” Toronto: University of Toronto Press, 2015.

<sup>204</sup> Nils Ørvik. 1980. Canadian Defence Policy: Choices and Directions. *National Security Series* (Queen’s University Centre for International Relations) 2: 31.

<sup>205</sup> Justin Massie and Benjamin Zyla, “Alliance value and status enhancement: Canada’s disproportionate military burden sharing in Afghanistan,” *Politics & Policy* 46, no. 2 (2018): 320–344.

<sup>206</sup> Stockholm International Peace Research Institute (SIPRI), Yearbook: Armaments, Disarmament, and International Security. Cited in The World Bank. Data Bank. “Military Expenditure (% of GDP) – Canada.” 2020. <https://data.worldbank.org/indicator/MS.MIL.XPND.GD.ZS?locations=CA>



Canada's limited defence spending is offset by its frequent participation in and occasional leadership of multinational military operations.

This approach was applied in Ukraine. Prime Minister Stephen Harper exclaimed rather aggressively, "our duty is to stand firm in the face of Russian aggression." However, Canada is not immediately threatened by Russian aggression in the way Ukraine is and the way NATO's eastern allies may be. Canada responded because it is in Canada's best interest to contribute personnel or resources to any mission Canada can afford in the name of strengthening ties with either the US or NATO. Canada deploys on operations to prove its relevance and leadership. This has been demonstrated in Ukraine with Op UNIFIER where Canada contributed the largest and most dispersed training mission of any NATO ally in Ukraine, in Latvia with Canada's Op REASSURANCE leading the eFP Battle Group and in Iraq with Canada's Op IMPACT leading NATO Mission Iraq (NMI) in 2019. Jeffrey Rice and Stéfanie von Hlatky argue, "taking a leadership role in an operation is an important qualitative indicator of burden-sharing."<sup>207</sup> Polish academic Magdalena Marczuk-Karbownik praises Canada's cooperation with Poland and other allies in Ukraine and writes, "Canada is the leader among the international supporters of Ukraine in its efforts to restore stability and implement necessary democratic and economic reforms."<sup>208</sup> Canada's work in Ukraine has demonstrated that Canada is engaged in the world and remains a worthy partner despite the small budget.

Canada's "Strategy of Commitments" is also limited by personnel and equipment. Former Minister of Foreign Affairs Stéphane Dion spoke frankly about Canada's limited bandwidth on the international stage saying: "We are receiving requests from everywhere. If we are saying yes to everybody, we'd have a big problem. We'll need to be very selective and to choose the way where Canada will have value added within the coalitions in which we are."<sup>209</sup> Justin Trudeau's Government had to decide between UN-led peacekeeping which it campaigned to increase and the NATO and US standoff with Russia over Ukraine.<sup>210</sup> James McKay portrays Canada's decision space with limited resources arguing that Canada can, "(1) maintain all major military commitments, be they actual or planned; (2) maintain some major military commitments but withdraw from others; or (3) minimize actual major military commitments to enable what is planned."<sup>211</sup> Op UNIFIER in Ukraine is an inexpensive (both in dollars and personnel) commitment with global strategic impact in Canada's favour giving the Government of Canada the ability to demonstrate to NATO allies that Canada is worth its weight in the alliance.

Lubomyr Luciuk addressed the Canadian House of Commons Standing Committee on National Defence on October 16, 2017 after conducting field research in Ukraine. He argued before the committee that Canadian efforts to train Ukrainian security forces should be continued and that the Canadian soldiers conducting the training gained experience and knowledge transfer from working with experienced Ukrainian soldiers returning from joint force operations in the East.<sup>212</sup> Having Canadian soldiers

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<sup>207</sup> Jeffrey Rice and Stéfanie von Hlatky. "Trudeau the Reluctant Warrior? Canada and International Military Ops." in Norman Hillmer and Phillipe Lagassé, eds. *Justin Trudeau and Canadian Foreign Policy*. Cham, Switzerland: Palgrave Macmillan, 2018. Page 296

<sup>208</sup> Magdalena Marczuk-Karbownik. "Canada Will Not Stand Idly By: Ukraine in The Foreign Policy of Canada." *International Studies* (Łódź, Poland) 18, no. 2 (2016): 121–31. <https://doi.org/10.1515/ipcj-2016-0013>.

<sup>209</sup> Lee Berthiaume. The Canadian Press. Global News. "Liberals still planning UN peacekeeping mission despite Latvia commitment." July 9, 2016. <https://globalnews.ca/news/2814248/liberals-still-planning-un-peacekeeping-mission-despite-latvia-commitment/>

<sup>210</sup> Lee Berthiaume. The Canadian Press. CTV News. "Trudeau defends NATO force, slams Russia's 'illegitimate' actions" July 9, 2016. <https://www.ctvnews.ca/politics/trudeau-defends-nato-force-slams-russia-s-illegitimate-actions-1.2980160>

<sup>211</sup> McKay. (2017).

<sup>212</sup> Lubomyr Luciuk. "National Defence Committee on Oct. 16th, 2017." [openparliament.ca](https://openparliament.ca), October 16, 2017. <https://openparliament.ca/committees/national-defence/42-1/61/dr-lubomyr-luciuk-1/>.

dispersed across Ukraine mattered as it demonstrated to Russia that Canada is serious about the crisis in Ukraine and demonstrates to NATO that Canada is willing to accept risk and spend money to this end. Ukrainian President Volodymyr Zelensky requested Canada and Britain at the negotiation table in advance of Normandy Group talks. Although it can be assumed that the President was searching for support from Western countries, something the Russian delegation would never agree to, this nonetheless is the kind of attention Canada searches for in international settings.

Notwithstanding the fact that Canada does not meet spending targets for defence it compensates by contributing to expeditionary operations in support of alliance objectives to maintain Canadian relevance on the international stage. Canada's Op UNIFIER was a demonstration by the Government of Canada to the international community that Canada remains engaged in Europe and will support partners and alliance interests. Twenty-first century Western militaries are extremely expensive, and Canada is doing its best to balance legitimate security crises with an impact on Canada or allies abroad with the many competing priorities domestically. SFCB as conducted on Op UNIFIER is cost effective (around \$20 million per year) and has major strategic impacts in terms of strengthening partnerships and demonstrating commitment to shared allied values and NATO expansion. It mattered having Canadian boots in Lviv, Kyiv, Kharkiv, Odesa, Desna, Berdyansk and many other bases and training areas in Ukraine. Soldiers on Canada's Op UNIFIER conducted SFCB tasks in Ukraine to support Ukraine's integration into NATO.

However, when President Joe Biden was pressed on the question of Ukraine joining NATO, he responded with "schools out on that question".<sup>213</sup> The two most highly suspected opponents within NATO to Ukraine's NATO integration are Germany and France, but even the US which poured money into United States European Command (USEUCOM) after 2014 to support training of the Armed Forces of Ukraine had doubts about Ukraine's corruption, limited resources, overstretched forces and military professionalism (and concern that any concrete moves to bring Ukraine into NATO would raise tensions with Russia). The value of Op UNIFIER was not in bringing Ukraine into NATO. The value of this mission was to the extent to which it demonstrated to the world that Canada is worthy of attention, alliance, and business because it is engaged on the international stage and willing to contribute skilled military personnel on training missions to support partners in need. And, this policy of providing modest assistance to Ukraine supported the American policy of aiding Ukraine while not rushing to bring Ukraine into NATO. The Biden administration prior to the 2022 invasion sought to reduce, not increase American commitments in Europe and the Middle East as it focusses on the Indo-Pacific. In other words, after 2014 before the Russian invasion of February 2022, Canada's modest efforts were in line with America's modest objectives.<sup>214</sup>

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<sup>213</sup>NBC News. "Biden On NATO Supporting Ukraine: 'School's Out on That Question'". YouTube. [https://www.youtube.com/watch?v=\\_b\\_Bcruv6Wk](https://www.youtube.com/watch?v=_b_Bcruv6Wk).

<sup>214</sup>Joshua Shifrinson and Stephen Wertheim. "Biden the Realist: The President's Foreign Policy Doctrine Has Been Hiding in Plain Sight." Foreign Affairs. September 9, 2021. <https://www.foreignaffairs.com/articles/united-states/2021-09-09/biden-realist>

## **Chapter 4. Burden Sharing and Canadian Defence Policy**

### **Op UNIFIER Highlighted the Burden-sharing Issue during the Russian buildup**

NATO defence burden-sharing has been a significant topic of study of alliance politics in the last thirty years since the fall of the USSR. Canada's defence spending and NATO burden-sharing has likewise preoccupied the attention of Canadian defence scholars as defence budgets dipped following the Cold War. Regardless, Canada took a leading role in countering Russian aggression and agitation in Ukraine after 2014 through its prominent role in SFCB. Canada has chosen to invest in people and training while avoiding the domestic political damage associated with increases in defence expenditures, particularly large capital expenditures. As argued above, Canada aims for an economy of effort in its NATO collective defence deployments and training missions, saving money on capital expenditures by prioritising spending on personnel and operations. This chapter starts with a basic introduction to the defence economics of burden-sharing followed by an analysis of Canada's defence spending and strategies in Ukraine to share the burden of NATO membership.

### **Defence as a Public Good**

The theory of public goods forms the basis of economic study of multinational military alliance. A public good is non rival and non-excludable.<sup>215</sup> A public good can be shared by all, meaning one consumer's usage does not stop another consumer from benefitting as well. Furthermore, it is impossible to exclude a consumer from consuming that good. Most firms specialize in producing specific goods demanded by the consumers of the economy. They take their product to the market for consumers to purchase. Consumers likewise meet in the market with the correct producer for the good they wish to consume and make a deal. If for example a given consumer is searching for a hockey stick, they find a firm in the market who produces hockey sticks and makes a deal for that good. In this example, the hockey stick is a private good, not public. It is a private good because it is rival and excludable. The hockey stick is rival because only the consumer who purchased the stick can benefit from its use during a game of hockey. It cannot be used by two players at once. The good is excludable because the consumer can easily stop another person from using the stick by locking it in the dressing room.

National defence is a popular example in studies of public goods because of the universality of the service paid for by everyone through taxation. There is no consumption rivalry when it comes to defence as everyone benefits equally.<sup>216</sup> If a consumer were to live in a country without any national defence apparatus, they would have to go to the market in order to purchase security for themselves and their estate. In the market they could find a firm contracting military service to deal with and establish a contract for military protection of the consumer's estate. Even in this example of a private contract for defence, the military service is still non-rival and non-excludable. The presence of the private military contractors deters potential enemies from attacking the consumer's estate, but it also deters them from doing the same against the neighbours in the surrounding community. No one will want to attack the neighbour with a private army in the neighbourhood. Freeriding in this instance is impossible to prevent because the consumer cannot prevent the neighbour from benefitting from the security without contributing to the service by paying a charge. There cannot be an optimum quantity of military protection because neighbours will feel protected enough by the consumer's military contract to not feel the need to pay for military contractors themselves. The optimum quantity of armed forces in a country providing national defence is decided by the government and the benefit of the deterrence these forces

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<sup>215</sup> Paul A Samuelson. "The Pure Theory of Public Expenditure." *The Review of Economics and Statistics* 36, No. 4 (1954): 387–89. <https://doi.org/10.2307/1925895>.

<sup>216</sup> Ralph W Bailey, Jürgen Eichberger, And David Kelsey. "Ambiguity And Public Good Provision in Large Societies." *Journal Of Public Economic Theory* 7, No. 5 (2005): 741–59. <https://doi.org/10.1111/J.1467-9779.2005.00242.X>.

provide is shared by all consumers in that country's economy. Protecting people from violence is a critical task of the government. This comes at a cost to the government in purchasing military capital, funding operations and maintenance and paying and taking care of personnel subject to the defence budget. Service personnel are paid by the government to deploy on exercises and operations employing the military capital procured by the state. Service personnel are effectively the produce and consumer of the national defence as they benefit from the service that they provide as citizens of the country that they defend.

In the absence of war, service personnel still provide defence to the state's economy through deterrence achieved by military readiness which is developed in training. The armed forces of a given state cannot exclude an individual citizen from benefitting from the security they provide on while on operations or while training at home. There is no additional marginal cost if an individual immigrates to the country they defend.<sup>217</sup> Impure public goods are similar to pure public goods except the producer can ration the consumption of the good. If the government could charge a pay-per-use fee when the armed forces are deployed on operations and exclude those who do not pay the charge like a toll route in a highway system, then defence could be considered impure. However, since the defence budget comes from a share of the total federal budget with revenues coming from established rates of taxation, the price for security borne by the consumer is inflexible to immediate changes in the security environment. According to Stiglitz, "Public goods have two critical properties. The first is that it is not feasible to ration their use. The second is that it is not desirable to ration their use".<sup>218</sup>

Such remains the case with collective defence. Under Article 5 of the North Atlantic Treaty, all NATO members benefit from the deterrence that all other members would respond if they were attacked. Collective defence is a deterrent. National tax dollars are committed to defence to prevent defence forces from needing to be used by deterring a potential enemy from attacking in the first place. Most defence forces are not in continuous combat operations. This makes it difficult to substantiate the cost when the return on investment is essentially invisible to the taxpayer. This makes defence an easy political target domestically for budget cuts to make room for projects of more immediate benefit to the public welfare. At present, if defence spending had to be cut to fund research and development into a better COVID-19 vaccine, would not governments be justified in doing so? There are other priorities. One way to illustrate that the exclusion of defence would be unfeasible, and undesirable would be to discuss the marginal cost of having zero defence. If defence forces are not defending some, they are not defending all. The cost born from loss of infrastructure and opportunity cost of time and money spent on private security makes it infeasible and undesirable to exclude defence.<sup>219</sup> However, defence spending does not benefit all citizens equally. Those who might live close to a disputed border, for example in the Kashmir region might obtain greater immediate security. In addition, citizens who benefit economically from defence spending either because they are employed by the arms industry or live in a location which has a major arms producer, would seem to benefit disproportionately from this "public good." Defence also provides employment. Canada's naval shipyards in Levis, Québec and Halifax, Nova Scotia provide significant employment to the local economy. The 5th Canadian Division Support Base Gagetown in Oromocto, New Brunswick is the third largest employer in all New Brunswick behind The Province of New Brunswick and the Irving corporation.<sup>220</sup>

### **Components of Defence Expenditure and the Factors Influencing Them**

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<sup>217</sup> Joseph E. Stiglitz. *Economics Of the Public Sector*. 2nd Ed. New York: W.W. Norton, 1988. 124

<sup>218</sup> *Ibid.*, 120.

<sup>219</sup> *Ibid.*, 123.

<sup>220</sup> Government of Canada. Canadian Army. 5th Canadian Division Support Base Gagetown. August 17, 2021. <http://www.army-armee.forces.gc.ca/en/5-canadian-division/5-canadian-division-support-base-gagetown/index.page>

The three categories of defence spending are personnel, capital and operations and maintenance. Costs attributed to personnel include everything required to force-generate military personnel for operations. This includes their education, training, pay, health, benefits, allowances, and other support mechanisms. Military capital refers to all the vehicles, weapons, equipment which the personnel employ. Operations and maintenance expenditures refer to costs born executing the missions assigned to the personnel and maintaining the readiness of their units and equipment.

Equipment employed by the personnel of the armed forces tend to take a long time to procure, produce and have long lifespans. This whole process from identifying the requirement to fielding the equipment can span decades. While reducing capital expenditure may not have immediately tangible effects, the long run effects will be felt by future generations of personnel who may not have the equipment they need when they need it most. Jack Treddenick argues, "capital expenditures have little to do with current combat readiness....in any given year, capital expenditures could be reduced...without affecting current combat readiness".<sup>221</sup> It is this mentality which makes capital expenditures an easy target for reduction in defence spending compared to personnel or operations and maintenance. Sometimes, but not always a reduction in capital expenditures means the cancellation of a military capability. Canada has seen multiple periods of decreased capital expenditures particularly in the 1990s and following combat operations in Afghanistan.

Historically, as Jack Treddenick has argued, maximizing the quantity of personnel in the armed forces subject to the defence budget has characterized the deterrence strategy of most militaries.<sup>222</sup> However in Canada, personnel numbers are down, and the share of the defence budget dedicated to personnel expenditures has decreased in the last few decades. Peter Weltman of the Parliamentary Budget Office found, "in 1995, personnel costs accounted for 51 per cent of defence expenditure; by 2014, its share had dropped to 47 per cent".<sup>223</sup> Today it is 37 %.<sup>224</sup> It takes time to train personnel from recruits to their operational functional point where they can be expected to perform their assigned missions, often years. Like capital expenditures, reduction in personnel (intended or otherwise due to recruitment or retention issues) has long run implications on military capability.

Compared to personnel and capital expenditures, reductions in operations and maintenance are felt acutely in the short run. This is because this budget is directly tied to force employment of personnel and equipment. The Government of Canada cannot demonstrate that their commitments to allies and partners are valid and defence expenditures are useful without deploying soldiers and equipment on exercises and operations on the global stage. Deterrence is based on enemy perception. Only Moscow knows if Canada's eFP deployment in Latvia has deterred them from invading the NATO ally. It is certain however that Op UNIFIER did not deter Russia from invading Ukraine. Therefore, the long run capital procurement intended to achieve deterrence is sacrificed for short run operational expenditures with more tangible outputs.

The share of the federal budget dedicated to defence expenditures and as well how the defence budget is divided are both influenced by domestic national politics in democratic societies in addition to the international security situation. Leaders make political decisions on issues of defence that often outlive their government. Budgetary decisions to capital expenditures for example will have long term

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<sup>221</sup> Treddenick In Bland, 59-60

<sup>222</sup> John Treddenick. Distributing The Defence Budget: Choosing Between Capital and Manpower. 59-60. In Douglas Bland. "Issues In Defence Management." Kingston, Ont: School of Policy Studies, Queen's University, 1998.

<sup>223</sup> Peter Weltman. Fiscal Sustainability of Canada's National Defence Program. Ottawa, Ontario: Canadian Electronic Library, 2015. 11. Retrieved From [Http://Www.Pbo-Dpb.Gc.Ca/Web/Default/Files/Files/Files/Defence\\_Analysis\\_En.Pdf](http://www.pbo-dpb.gc.ca/web/default/files/files/files/defence_analysis_en.pdf)

<sup>224</sup> Department Of National Defence. April 03, 2020. Defence Budget. Retrieved From [Https://Www.Canada.Ca/En/Department-National-Defence/Corporate/Reports-Publications/Transition-Materials/Defence-101/2020/03/Defence-101/Defence-Budget.Html](https://www.canada.ca/en/department-national-defence/corporate/reports-publications/transition-materials/defence-101/2020/03/defence-101/defence-budget.html).

effects not felt during the current government. Projects started under one government's leadership see completion under another government or perhaps the cancellation or failure to procure a particular platform as a cost saving strategy decreases future capability. The current government does not benefit in the short run from capital investment and does not pay the consequences of budget cuts that diminish long run capability. Short term political gain within the election cycle can take priority. Democratic governments have a short window to meet targets stated in their election platforms and are critiqued by the electorate at the voting booth. Failure can cost re-election. External political influence also affects defence budgets. Capital expenditures as a share of Canada's defence budget increased in the 1970s conforming with other NATO member countries who increased spending on conventional forces as part of the "Flexible Response" strategy.<sup>225</sup> The increase in capital expenditures on conventional forces was driven by the USA as a nuclear power demonstrating to the USSR that they were not afraid to commit conventional forces and that they have more options at their disposal.

The priorities of the Department of National Defence change with the election and formation of new governments. For example, after the 1963 election the General Purpose Frigate program of the Diefenbaker Progressive Conservatives was canceled by the newly elected Pearson liberals.<sup>226</sup> Special interest groups and their lobbyists apply pressure on the government to continue investments in the defence industry. During the navy's procurement of the Iroquois-class destroyers "shipbuilding companies pressured the government to build ships so that they could maintain employment and a firm technological base." The CAF did not help the situation when "approved [for] a Volkswagen, the military purchased a Cadillac."<sup>227</sup> How the state divides its defence budget as well as the size of the pie altogether is decided by politics, domestic and international.

Domestic priorities shape the division of the defence budget amongst personnel, capital and operations and maintenance expenses.<sup>228</sup> Treddenick argues that the government can take a "man-the-arm" approach which sees capital expenditures supersede personal expenditures or a "arm-the-man" approach which sees personnel and operating costs taking the larger share of expenditures.<sup>229</sup> In 2020, Canada spent approximately 37% on personnel, 17% on capital procurement and 36% on operations and maintenance.<sup>230</sup> The share of personnel and operations and maintenance costs will continue to grow in response to a growing need to recruit and retain personnel and with increases to NATO commitments following the Russian invasion of Ukraine in 2022 as indicated in Budget 2022. Canada's large share of personnel expenditure compared to capital procurement expenses indicates an "arm-the-man" approach.<sup>231</sup> Canada is also a top ten contributor to NATO common funded budgets. This doing more with less (equipment and budget) attitude has persisted since the 1990s and has characterized Canada's involvement in NATO. However, this may change if plans to increase capital procurement to 32% surpassing the NATO 20% guideline succeed in 2024.<sup>232</sup>

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<sup>225</sup> Treddenick. *The Defence Budget*. 1995. In David B. Lewitt and David Leyton-Brown. *Canada's International Security Policy*. Scarborough, Ont: Prentice-Hall Canada, 1995. and Department Of National Defence. *Defence Budget*. Retrieved From <https://www.canada.ca/en/department-national-defence/corporate/reports-publications/transition-materials/defence-101/2020/03/defence-101/defence-budget.html>, Page 66.

<sup>226</sup> J.W. Arseneault. "The DDH 280 Program: A Case Study of Governmental Expenditure Decision-Making," In *Canada's Defence Industrial Base*, Ed. David G. Haglund (Kingston: Ronald P. Frye & Company, 1988), 124-125

<sup>227</sup> *Ibid.*, 122.

<sup>228</sup> Treddenick In Bland, 59-60.

<sup>229</sup> *Ibid.*, 64.

<sup>230</sup> Government of Canada. Department of National Defence. March 2020 - Defence Budget. <https://www.canada.ca/en/department-national-defence/corporate/reports-publications/transition-materials/defence-101/2020/03/defence-101/defence-budget.html>

<sup>231</sup> Treddenick In Bland, 64.

<sup>232</sup> Government of Canada. Department of National Defence. Main Estimates – Grants and Contributions. March 01, 2021. <https://www.canada.ca/en/department-national-defence/corporate/reports-publications/proactive-disclosure/main-estimates-2020-2021/main-estimates-grants-contributions.html#toc6>

The military's share of the federal budget is subject to internal factors such as the state's economy and external factors such as the international security environment and the perception of threat. The amount of money allocated to defence is influenced by the domestic political will. Andrew Bennett, Joseph Leggold, and Danny Unger argue that alliance freeriding is rooted in domestic political pressure to keep defence spending low.<sup>233</sup> David Auerswald and Stephen Saideman have found too that countries with minority or coalition government deployed less troops to Afghanistan than countries with single-party majority governments.<sup>234</sup> However, Alexander Lanoszka argues in contrast, "what looks like freeriding could be the result of low threat assessments" or "implementation of a grand bargain with the US" instead of "opportunistic exploitation."<sup>235</sup> Some internal economic factors which influence defence budget include taxation rate, GDP and implicit price deflator ad regional economic activity. Regions with lower-than-average economic activity in Quebec and the Maritimes benefit from the jobs created in the defence industry located there be it shipbuilding in Quebec and Nova Scotia or remote bases in New Brunswick or Newfoundland and Labrador. Treddenick argues, "in effect, the defence budget is defence policy".<sup>236</sup> Priorities are allocated resources and the allocation of resources is controlled by the government's platform and budget.

Defence budgets are affected by external factors which include a country's grand strategy or geopolitical aims, fulfilment of treaty or alliance obligations, perception of threat, and, as Cooper and Zycher describe, response to "the defence budget of its rivals."<sup>237</sup> Benjamin Zyla has argued that "Second Tier Powers" in alliances feel obligated to perform external responsibilities as a show of commitment.<sup>238</sup> Zyla uses "external responsibility" to describe Canada's commitment to European security through NATO driven by Canada's "deep-seated intersubjective belief that it should aid in helping other countries to secure peace, freedom, stability, and development."<sup>239</sup> Charles Cooper and Benjamin Zycher argue that NATO burden-sharing debate or as they refer to it the "transatlantic bargain" is rooted in "differences in interests and perceptions about the goals, means, costs, and benefits of activities undertaken by NATO collectively".<sup>240</sup> NATO is a diverse group of countries in terms of their different sizes, geopolitics, military capabilities and demand for defence. Grand strategy vs emergent strategy

In response to Russia's 2014 invasion of Ukraine and annexation of Crimea, most NATO member countries especially in the Eastern part of the alliance increased defence budget.<sup>241</sup> Ottawa's rhetoric of defence spending increases is rooted in a need to prove to NATO and more so the US that Canada can meet its NATO commitments despite not being able to reach the spending guideline. With all the talk of defence budget increases of the liberal government according to SIPRI database Canada's budget has increased from 1.0% of GDP before the War in Ukraine (half of the NATO guideline) to 1.3% in 2021, still far off from the 2.0% guideline.<sup>242</sup> Canada's Department of National Defence is competing

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<sup>233</sup> Andrew Bennett, Joseph Leggold, And Danny Unger. "Burden-Sharing in The Persian Gulf War." *International Organisation* 48, No. 1 (1994): 74. <https://doi.org/10.1017/S0020818300000813>.

<sup>234</sup> David P Auerswald and Stephen M. Saideman. *NATO In Afghanistan: Fighting Together, Fighting Alone*. Princeton, New Jersey: Princeton University Press, 2014. 14-15

<sup>235</sup> Alexander Lanoszka. "Do Allies Really Free Ride?" *Survival* (London) 57, No. 3 (2015): 145. <https://doi.org/10.1080/00396338.2015.1046229>.

<sup>236</sup> Treddenick In Dewitt & Leyton-Brown, 413

<sup>237</sup> Karl Skogstad. "Defence Budgets in The Post-Cold War Era: A Spatial Econometrics Approach." *Defence And Peace Economics* 27, No. 3 (2016): 323–52. <https://doi.org/10.1080/10242694.2015.1034911>.

<sup>238</sup> Zyla. (2015). Page 10.

<sup>239</sup> Benjamin Zyla. "Explaining Canada's Practises of Burden-Sharing in The International Security Assistance Force (ISAF) Through Its Norm Of 'External Responsibility.'" *International Journal* (Toronto) 68, No. 2 (2013): 289–304. <https://doi.org/10.1177/0020702013493756>.

<sup>240</sup> Charles A. Cooper and Benjamin Zycher. *Perceptions Of Nato Burden-Sharing*. Santa Monica: Rand. 1989.

<sup>241</sup> SIPRI. *SIPRI Military Expenditure Database*. (2021). <https://www.sipri.org/databases>.

<sup>242</sup> *Ibid*.

for resources with every other department of the federal government and other government priorities. Therefore, external factors affecting defence budget such as treaty obligations and perceived level of threat although influential cannot be assessed alone.

### **Maintaining Readiness While Subject to Budget Constraint**

The readiness of military forces is critical to alliance burden-sharing. With deterrence theory being an important aspect of most military alliances, member militaries must maintain a threshold of readiness to participate in the burden-sharing of the alliance. Force generation and force employment of NATO militaries is prohibitively expensive. NATO service personnel are paid more and have more benefits and must be transported and supplied. Costs balloon even further for deployments outside of Europe where strategic airlift is required to sustain operations. As the battlefield becomes increasingly technologically advanced, war becomes increasingly capital intensive in terms of expensive technologies required to remain competitive internationally. With expensive technology comes increasingly expensive operations and maintenance as these technologies become more complex and expensive to field and maintain. Specialization of military capability can reduce this affect by funneling resources into targeted capabilities and maintaining a comparative advantage of utility for the greater alliance while other capabilities are covered off by other members specializing in different capabilities. Alia Alatassi and Anessa Kimball argue that specialization improves military outputs on operations.<sup>243</sup> Canada gave up its aircraft carrier capability in 1970 upon the decommissioning of HMCS Bonaventure (an aircraft carrier with a combination of jet fighters, helicopters, and anti-submarine warfare trackers onboard) in favour of investment in small anti-submarine warfare (ASW) vessels and aircraft. Canada's good work in ASW improved its reputation in NATO. Economies of scale can be achieved when countries specialize and scale a particular capability of their comparative advantage.<sup>244</sup> Lagassé argues that it is not necessary to maintain a breadth of military capabilities when other allies can maintain capabilities at a comparative advantage.<sup>245</sup> In the case of the Canadian navy of the 1970's, there was no need to maintain an aircraft carrier group when it could participate in allied burden-sharing by deploying its ASW platforms in NATO fleets at much less cost.

States will also invest in multirole platforms to maintain multiple capabilities at lower cost. Buying one unit which can perform the capabilities of multiple makes potential for cost saving. The risk here is that the government buys a platform that is a jack of all trades but a master none, easily defeated by opposing platforms more specialized in their role. However, there is risk too in specializing. If the specialization is too narrow, the military does not have a baseline of capabilities to draw from. The Military cannot predict the nature of future wars and therefore benefits from maintaining multiple capabilities that could be required in future fighting. Furthermore, if too much effort is spent on a capability which eventually becomes obsolete within its life cycle, then the government experiences a sunken cost when the money cannot be recovered from a capability that cannot be used. This is especially dangerous if a situation arises requiring a capability outside the military's current arsenal and the specialized equipment cannot adapt. Canada is experienced in procuring multirole platforms. Many multirole platforms exist in the Canadian Armed Forces today. The army's Tactical Armoured Patrol Vehicle, the air force's F-188 multirole fighter and the navy's Halifax-Class multirole patrol frigate are all

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<sup>243</sup> Anessa L. Kimball and Alia Alatassi. "Previous Commitments and Future Promises: The Relationship Between Military Capacity, Alliance Reliability and Future Alliance Potential, 1950-2005." *Conflict Studies eJournal* (2009): N. Pag. SSRN Electronic Journal. Doi: 10.2139/SSrn.1534903

<sup>244</sup> Arthur Grimes And James Rolfe. "Optimal Defence Structure for A Small Country." *Defence And Peace Economics* 13, No. 4 (2002): 285. <https://doi.org/10.1080/10242690212353>; and Philippe Lagassé. "Specialisation And the Canadian Forces." *Defence And Peace Economics* 16, No. 3 (2005): 208. <https://doi.org/10.1080/10242690500123208>.

<sup>245</sup> Lagassé, 212.



good examples.<sup>246</sup> Canada is continuing its investment in multirole platforms in order to maximize capabilities on flexible and adaptive platforms at the minimum project cost. Canadian procurement looks for the flexibility to respond to multiple conditions or threats and the adaptability to be able to respond to something new.

### **Burden-Sharing Metrics**

While national defence has always been an example of a pure public good in studies of defence economics, it was Mancur Olson and Richard Zeckhauser who translated public good theory to international military alliances in 1966.<sup>247</sup> Olson and Zeckhauser studied the case of NATO membership, and since then NATO has become the major subject of study of alliance burden-sharing in the West. NATO produces deterrence, which is a pure public good, non-rival and non-excludable.<sup>248</sup> Given that defence is non-excludable, it is theoretically possible that a consumer benefits from the security afforded by defence. Economists refer to this scenario as the Free-Rider Problem. This is a market failure as some actors consume more than their fair share. The term “free-rider” is politically charged in alliance circles and is used as a rhetorical device to refer to allies who are spending less on defence than expected by other allies. Membership in any military alliance comes with an expectation to contribute to the alliance and alliance goals. This idea of contributing to alliance objectives is most often referred to as “burden-sharing”. There are other similar labels to define the process of contributing to an alliance such as “burden-shedding”, “burden-shifting”, “responsibility-sharing”.<sup>249</sup> The word “burden-sharing” is most common and is also a common rhetorical weapon used by larger states of a military alliance in a position to influence smaller states to increase marginal contribution to collective security.<sup>250</sup>

Olson and Zeckhauser introduced collective action theory, now the dominant approach to study of burden-sharing, defining the “burden” of the defence alliance in terms of public good theory.<sup>251</sup> Their approach recognizes the inherent sub-optimality of alliances such as NATO as countries who value defence more than others spend more and therefore shoulder a more significant share of the defence burden of the alliance compared to others. Larger states in the military alliance bear a larger burden and smaller states, as self-interested actors, benefit from the security assurance of the alliance at minimal cost.<sup>252</sup>

Conversely, smaller allies also fear full freeriding because the larger allies can leave them behind. Todd Sandler, Jon Cauley, and John Forbes pioneered the joint products model looking at defence expenditures as a mixture of public and private goods separating defence expenditures into deterrence,

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<sup>246</sup> Royal Canadian Navy. Canadian Patrol Frigates. (2018, September 26). Retrieved From [Http://Www.Navy-Marine.Forces.Gc.Ca/En/Fleet-Units/Frigates-Home.Page](http://www.navy-marine.forces.gc.ca/en/fleet-units/frigates-home.page); and Royal Canadian Air Force. Cf-188 Hornet Fact Sheet. (2020, June 15). Retrieved From [Https://Rcaf-Arc.Forces.Gc.Ca/En/Aircraft-Current/Cf-188-Fact-Sheet.Page](https://rcf-arc.forces.gc.ca/en/aircraft-current/cf-188-fact-sheet.page)

<sup>247</sup> Mancur Olson And Richard Zeckhauser. “An Economic Theory of Alliances.” *The Review of Economics and Statistics* 48, No. 3 (1966): 266–79. [Https://Doi.Org/10.2307/1927082](https://doi.org/10.2307/1927082).

<sup>248</sup> See Jens Ringsmose. “Nato Burden-Sharing Redux: Continuity and Change After the Cold War.” *Contemporary Security Policy* 31, No. 2 (2010): 329. [Https://Doi.Org/10.1080/13523260.2010.491391](https://doi.org/10.1080/13523260.2010.491391); And Joseph Lepgold. “NATO’s Post-Cold War Collective Action Problem.” *International Security* 23, No. 1 (1998): 95. [Https://Doi.Org/10.1162/isec.23.1.78](https://doi.org/10.1162/isec.23.1.78); And Hirofumi Shimizu and Todd Sandler. “Nato Peacekeeping and Burden Sharing: 1994-2000.” *Public Finance Review* 31, No. 2 (2003): 123–43. [Https://Doi.Org/10.1177/1091142102250323](https://doi.org/10.1177/1091142102250323); And Todd Sandler and Keith Hartley. *The Political Economy of Nato: Past, Present, And into the 21st Century*. Cambridge, U.K.: Cambridge University Press, 1999. 102-103

<sup>249</sup> See Simon Duke. *The Burden Sharing Debate: A Reassessment*. New York: St. Martin’s Press, 1993; And Wallace J. Thies. *Friendly Rivals*. New York: M.E. Sharpe, 2003; Stephen J. Cimbala and Peter K. Forster. *Multinational Military Intervention: Nato Policy, Strategy and Burden Sharing*. Burlington: Ashgate, 2010.

<sup>250</sup> Martial Foucault and Frédéric Mérand. The Challenge of Burden-Sharing. *International Journal* 67, No. 2. 2012. 424.

<sup>251</sup> Olson And Zeckhauser, 266–79.

<sup>252</sup> John R. O’Neal “The Theory of Collective Action and Burden Sharing in Nato.” *International Organisation* 44, No. 3 (1990): 379–402. [Https://Doi.Org/10.1017/S0020818300035335](https://doi.org/10.1017/S0020818300035335).

protection, and mixed weaponry<sup>253</sup>. Deterrence expenditures take the form of strategic weapons which are the purest public good in an alliance because of their non-rivalry and non-excludability (everyone in the alliance equally benefits from the deterrence that nuclear weapons provide). Protection expenditures refer to tactical weapons that could be reasonably excludable when employed only in regions outside of the alliance area of operations. Mixed weaponry can provide both deterrence and protection and thus can also be excludable if employed outside of alliance boundaries.<sup>254</sup>

Since the early negotiations of the North Atlantic Treaty, efforts have been made to guarantee that members would assume their fair share of the collective defence burden. In more recent history, this has taken the form of the “two and twenty” guidelines. As early as 2006 when NATO was leading the International Security Assistance Force (ISAF) in Afghanistan, an informal defence spending target of 2% GDP was floated as at the time Canada and the European members were averaging around 1.7% of GDP on defence spending. This was thought to be an achievable increase at a time given that NATO forces were in active combat operations. After 2011 when many ISAF contributors started to withdraw from combat operations, budgets dwindled to an average of around 1.5%. This reduction angered officials of the larger powers who were contributing significant national treasure to defence spending namely the US. As US Secretary of Defense Robert Gates declared in 2011: “there will be dwindling appetite and patience in the US Congress – and in the American body politic writ large – to expend increasingly precious funds on behalf of nations that are apparently unwilling to devote the necessary resources [...] to be serious and capable partners in their own defence.”<sup>255</sup> However, these remarks did little to expand budgets in NATO Europe and Canada until 2014.

Following the deteriorating security situation on NATO’s eastern flank as Russia invaded the Donetsk and Luhansk oblasts of Ukraine and annexed the Ukrainian Crimean Peninsula, eastern members of the alliance started the process to increase defence spending and the burden-sharing debate was in the forefront of alliance discussion. In September 2014, the heads of state of the NATO member countries met in Wales to discuss issues facing the alliance. As noted above, one outcome of this meeting was the Wales Summit Declaration and the Wales Pledge, a move toward formalising the 2% GDP defence spending guideline. Members at Wales agreed to increase defence budgets to 2% of GDP with 20% dedicated to capital procurement. However, Darryl Driver argues that Canada and Germany expended diplomatic efforts to ensure the Wales summit 2% was not legally binding.<sup>256</sup> Despite this agreement, some underspending countries such as Canada have made little improvement to their budgets. Following the election of former US President Donald Trump, American leadership increased warnings directed toward underspending members that they need to increase their defence budgets. American officials issued more warnings at the 2018 Brussels Summit, calling upon members “to submit credible national plans on its implementation, including the spending guidelines for 2024, planned capabilities, and contributions” (Brussels Summit Declaration, 2018). In 2021, Canada’s defence spending was still far

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<sup>253</sup> Todd Sandler, And Jon Cauley. “On The Economic Theory of Alliances.” *The Journal of Conflict Resolution* 19, No. 2 (1975): 330–48. <https://doi.org/10.1177/002200277501900207>; And Todd Sandler. “Impurity Of Defence: An Application to The Economics of Alliances.” *Kyklos* (Basel) 30, No. 3 (1977): 443–60. <https://doi.org/10.1111/J.1467-6435.1977.Tb02203.X>; And Todd Sandler, Jon Cauley, and John F Forbes. “In Defence of a Collective Goods Theory of Alliances. *The Journal of Conflict Resolution* 24, No. 3 (1980): 537-547; And Todd Sandler, And John F Forbes. “Burden Sharing, Strategy, And the Design of Nato.” *Economic Inquiry* 18, No. 3 (1980): 425–44. <https://doi.org/10.1111/J.1465-7295.1980.Tb00588.X>.

<sup>254</sup> For A Comparison of The Commitment Based and Joint Product Models See William R Gates and Katsuki L Terasawa. “Commitment, Threat Perceptions, And Expenditures in A Defence Alliance.” *International Studies Quarterly* 36, No. 1 (1992): 101–18. <https://doi.org/10.2307/2600918>.

<sup>255</sup> Thom Shanker. *Defence Secretary Warns Nato of ‘Dim’ Future*. *The New York Times*. 10 June 2011. <http://www.nytimes.com/2011/06/11/world/europe/11gates.html>

<sup>256</sup> Darrell Driver. “Burden Sharing and The Future of Nato: Wandering Between Two Worlds.” *Defence & Security Analysis* 32, No. 1 (2016): 13. <https://doi.org/10.1080/14751798.2015.1126970>.

below the guideline and will not reach 2% by 2024. Only after Russia invaded Ukraine in 2022 did Germany commit to spending €100 billion on defence bringing within the “two and twenty” guideline.

### **Burden-sharing of Inputs**

NATO’s “two and twenty” guideline is simple and theoretically universally applicable to the diverse budgets of NATO’s 30 members being fixed against national product. However, the last 15 years of discussion regarding the spending guidelines have been fruitless with only one third of member countries achieving targets. This has called into question the efficacy of the guideline. The NATO Parliamentary Defence Committee has discussed the issues with this guideline extensively. In November 2018, months after the Brussels summit, the Sub-Committee on Transatlantic Defence and Security Cooperation released a report authored by Attila Mesterhazy which outlined many of the issues facing the “two and twenty” model. These include questions of the lack of clarity or definition of what constitutes defence spending, the utility of a blanket metric for defence spending across diverse allies, and most critically, and a major argument of this thesis, the issue of the 2% guideline prioritising inputs over outputs. Significantly, assessing defence spending as a share of GDP ignores the benefit of high spending in absolute terms. Canada for example is a top military spender in absolute terms despite not meeting the 2% of GDP guideline thanks to its robust economy. This spending gives Canada a high-readiness military that can deploy internationally in line with government policy goals contributing to NATO deployments and supporting collective defence and shared interests.

With burden-sharing of NATO collective defence tied to defence spending, NATO members have decided to prioritise inputs that may not necessarily see usage by the alliance over real life NATO outputs such as exercises and deployments. The difficulty in tying expectations of burden-sharing to defence spending metrics is determining how much of that spending is accurate and benefits the alliance. Budgets can increase by billions with little of the money directed toward efforts that will be of value to NATO.<sup>257</sup> For example, the United Kingdom contributes its full 2% of GDP to defence spending, but in 2013 the UK reported USD 62.3 billion to NATO but only USD 57.7 billion to the UN.<sup>258</sup> Compare the US to Estonia or Latvia. All of Estonia’s 2.28% of GDP goes to NATO, but a significant chunk of America’s 3.52% of GDP is shifting to the Indo-Pacific far from the North Atlantic.<sup>259</sup> (Although the US will argue that meeting the challenge of China is of benefit to NATO.) Joseph Leggold has written extensively on how the non-excludability of military operations by NATO member countries including peace support operations outside of Europe raise burden-sharing concerns.<sup>260</sup> NATO membership is geared toward defending countries in Europe. It is difficult to assess the benefit of operations outside these boundaries to alliance members.

Another issue with the focus on inputs is that countries may spend 2% on budget but 60% goes to personnel costs or even if they spend 20% on capital, they buy weapons that are inappropriate for use on NATO missions.<sup>261</sup> It is also difficult to assess the convertibility of defence inputs to combat power. Russia spends much less than the European NATO members but has much more combat power deployable to NATO borders in the form of tens of thousands of troops, vehicles, and guns. While the

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<sup>257</sup> William Drozdiak. Instability To the South Worries Us. Forces In Europe. Washington Post Foreign Service. May 19, 1997. A02.

<sup>258</sup> Lucie Béraud-Sudreau and Bastian Giegerich. Counting To Two: Analysing the Nato Defence-Spending Target. IISS, February 14, 2017.

<sup>259</sup> Joseph Dobbs. “A New Approach to Transatlantic Burden-Sharing”, European Leadership Network. September 14, 2017. <https://www.europeanleadershipnetwork.org/policy-brief/a-new-approach-to-transatlantic-burden-sharing/>; And Nato Public Diplomacy Division. (2021). Defence Expenditure of Nato Countries (2014-2021). [https://www.nato.int/nato\\_static\\_fl2014/assets/pdf/2021/6/pdf/210611-Pr-2021-094-En.Pdf](https://www.nato.int/nato_static_fl2014/assets/pdf/2021/6/pdf/210611-Pr-2021-094-En.Pdf)

<sup>260</sup> Leggold. (1998).

<sup>261</sup> Elizabeth Braw. Tanking Up in Greece. Foreign Affairs. August 7, 2017. <https://www.foreignaffairs.com/articles/greece/2017-08-07/tanking-greece>

fighting in Ukraine in February 2022 has created doubts about the effectiveness of these “cheaper” forces, spending targets do though, still offer a metric to gauge burden-sharing which contributes to quantitative analysis. Possible replacements include Wolfgang Ischinger’s concept of 3% of GDP spent on “crisis prevention, development assistance, and defence” presented at the February 2017 Munich Security Conference.<sup>262</sup> With broader parameters, countries have more options to contribute to burden-sharing and prove their worthiness of alliance.

Claims of NATO members’ freeriding typically focus on defence expenditures as a share of GDP and ignore the country’s deployments or other more qualitative contributions. The level of freeriding is dependent on the definition of an optimal contribution to the treaty organisation. A given country’s optimal contribution can be found with economic theory and analysis. However, NATO’s understanding of the optimal contribution is the same 2% of GDP dedicated to defence expenditures expected of all member countries. All countries contribute some amount of money to the defence and security of their people. There are a variety of circumstances which influence the amount of money a country spends on defence. Grimes and Rolfe argue that “the ability to defend a country’s own sovereignty in response to a particular real or potential threat is considered an essential attribute of statehood”<sup>263</sup> It is the basic expectation of the state to secure the people and sovereign territory. For most countries, this means maintain military capability with state armed forces. Superpowers like the USA and China are perfectly capable of achieving this level of protection with their own militaries, but smaller and mid-sized powers rely on their alliance with larger powers to, “fulfil the objectives which their independent military expenditures cannot”.<sup>264</sup> NATO members rely principally on the USA but to some extent the UK, Germany, and France. The rest of NATO benefits from the security provided by the USA protected by Article 5 of the North Atlantic Treaty. Only a third of NATO members meet the defence spending guideline.<sup>265</sup> These other countries do not feel the need to spend any more than they need to make contributions knowing that they will be protected when they need it most.

Another issue with tying alliance contribution to defence spending and particularly capital procurement is the problem which arises in determining the marginal utility of the added equipment to the alliance. Some platforms may not benefit the alliance in the same way it benefits the country procuring them and therefore calls into the question how public these goods really are. Gates and Terasawa argue, that “a resource is partially private if its deployment provides the owner distinct benefits at the expense of the alliance’s objectives.”<sup>266</sup> An example of this phenomenon could be the procurement of a platform which is not interoperable with the rest of NATO or equipment deployed far enough from the North Atlantic area of operations that it could not reasonably be used in defence of allied objectives. The US balances numerous competing military priorities which require resources to be pushed outside of the North Atlantic. American equipment and personnel are deployed to support Africa Command, Central Command, Cyber Command, European Command, Indo-Pacific Command, Northern Command (this Command includes NORAD which has provided security for US strategic nuclear forces-the forces that provide NATO with extended deterrence), Southern Command, Space Command, Special Ops Command, Strategic Command (this command provides the strategic nuclear weapons upon which NATO has depended) and Transportation Command).<sup>267</sup> Th US does not focus all its resources on the North Atlantic whereas other members do. Every euro spent by a European member on equipment deployed domestically benefits the collective security of the alliance. How much of the military capital belonging to the US military which could be dedicated to NATO and therefore would have utility to the alliance is difficult to determine. This example highlights a flaw in tying spending and procurement of resources to

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<sup>262</sup> Mesterhazy. “Burden Sharing: New Commitments in A New Era.”

<sup>263</sup> Grimes And Rolfe, 272.

<sup>264</sup> Lagassé, 205-222.

<sup>265</sup> NATO.

<sup>266</sup> Gates and Terasawa, 101-118.

<sup>267</sup> United States Department of Defence. Combatant Commands. <https://www.defense.gov/our-story/combatant-commands/>

alliance burden-sharing. The US can have the most equipment in the world, but if they cannot manoeuvre equipment and personnel to support NATO in time then the alliance is no better off. Czechia maintains an important electronic warfare task force deployed to eFP Lithuania led by Germany but spends only 1.4% of GDP on Defence.<sup>268</sup> This is an important contribution for allied reassurance even if it costs less than procuring more expensive platforms. This is the difficulty in tying dollar amounts to contribution when less expensive capabilities can have greater marginal benefit to the alliance than more expensive capabilities.

Optimum contributions to the alliance differ by country based on their unique capabilities and security needs. As previously mentioned previously, larger, wealthier allies tend to spend more than smaller allies.<sup>269</sup> Spending guidelines are difficult to achieve without an enforcement mechanism. In smaller alliances of two or three members, lack of contribution is felt immediately, but with a large organization like NATO, individual efforts can go unnoticed. Despite this phenomenon, Efychia Nikolaidou argues that more powerful members of the alliance can influence the others to spend more on required capabilities by leading increasing their own budgets.<sup>270</sup>

Following the end of the Cold War the gap between the US and European defence widened. By 2018, the US accounted for 50% of NATO GDP but 70% of NATO defence expenditures. Despite the overwhelmingly large American share of defence spending, Europe has been catching up slowly. The year 2018 saw four more members surpass 2% of their GDP on defence spending. In 2021, there were ten member countries spending 2% of their GDP on defence spending making a full third of NATO meeting the guideline. NATO Europe and Canada have seen a six-year streak of rising defence budgets and capital procurement since 2015 with spending increasing by 4.1% and capital procurement increasing by 14.6% in 2021. Greece has surpassed the US in this regard spending an estimated 3.82% of GDP on defence in 2021 compared to the US's 3.52%.<sup>271</sup> Yet, Greece's defence spending may also be directed against fellow NATO member Turkey. With respect to capital expenditures, all but five members (including Canada) are spending 20% or more on capital. This improvement demonstrates solidarity of the treaty members in response to the collective threat posed by Russia in the East.

Compared to the US, most NATO members appear to be free riders or under achieving in some aspect of their defence capabilities. Therefore, alliance guideline metrics tied to GDP rather than by outputs of military capability (such as number of personnel, tanks, planes or ships in active service) can be useful. This way every country's military commitment is assessed relative to its economic strength. Because the American economy and military are so much larger than their allies in NATO, the marginal benefit of a marginal one percentage point of GDP increase in defence spending would translate to a significant amount of defence spending toward capabilities that would benefit the alliance. Comparatively, if Luxembourg increases its defence budget by one percentage point of GDP, the marginal benefit to the alliance in terms of equipment that could be procured would be minimal. Across the trillions of dollars spent by NATO member countries on defence, small increases in defence spending are hardly felt.

## **The Output Approach to Burden-sharing**

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<sup>268</sup> SIPRI. SIPRI Military Expenditure Database. (2021). <https://www.sipri.org/databases>. Ministry of Defence & Armed Forces of the Czech Republic. "Enhanced Forward Presence – Lithuania, Latvia." <https://www.army.cz/en/foreign-operations/current/baltics/enhanced-forward-presence---latvia--lithuania-201314/>.

<sup>269</sup> Gates And Terasawa, 102.

<sup>270</sup> Efychia Nikolaidou. "The Demand for Military Expenditure: Evidence from The Eu15 (1961-2005)." *Defence And Peace Economics* 19, No. 4 (2008): 273–92. <https://doi.org/10.1080/10242690802166533>.

<sup>271</sup> NATO. (2022).

An output approach to NATO burden-sharing focuses on productivity of members such as deployments on NATO missions and exercises and more intangible qualitative factors such as acceptance of risk and leadership. The benefit of this approach compared to a focus on inputs is that the marginal contribution is guaranteed to benefit NATO. For example, deployments to NATO's eFP provide assurance to Baltic members on NATO's eastern flank. Troop and vehicle contributions there have greater impact on supporting NATO collective defence than a marginal increase in spending dedicated somewhere else. In a similar manner, bilateral SFCB in Ukraine supports regional security on NATO's eastern flank. Marc Champion of Bloomberg illustrates burden-sharing using metrics beyond the classic "two and twenty" to include: percentage of active troops on NATO missions, percentage of trade suffered by Russian sanctions, number of refugees hosted. He shows that Canada led the increase in NATO contributions as a percentage of total active-duty troops between 2002 and 2018.<sup>272</sup> However, Canada only participates in 50% of NATO exercises.<sup>273</sup> The dichotomy here demonstrates a need for multiple metrics in analysing commitment and burden-sharing. There cannot be a single golden rule of burden-sharing as the diverse countries of NATO have to balance many commitments and will support NATO objectives their own way.

### **Op UNIFIER as a Share of the NATO Burden**

Canada is an example of a NATO member contributing to NATO operations and the development of NATO's regional partners while failing to meet spending guidelines. Canada was among the lowest spenders at 1.39% in 2021 decreasing spending from 2020 and amongst the lowest capital procurers at 17.7% of budget. Binyam Solomon finds that Canadian defence spending typically follows allied spending.<sup>274</sup> The slight increase in defence spending after 2014 supports the argument that Canada followed NATO Europe's trending expanse in defence expenditure following the deteriorating security situation in Ukraine. According to John Alexander, Justin Massie and Benjamin Zyla, Canada's low defence spending does not reflect its actual contributions to the Alliance.<sup>275</sup> Benjamin Zyla demonstrated that during NATO's peace enforcement mission in Bosnia and Herzegovina during the 1990s, Canada "sent disproportionately more forces to IFOR [Implementation Force] than their conventional major power counterparts."<sup>276</sup> He and Justin Massie similarly argued in the case of NATO's mission in Afghanistan that, "the size and riskiness of Canada's military deployments as part of the ISAF operations not only reflected Canada's value for the alliance but also aimed at revamping the country's international status as a leading military ally."<sup>277</sup> In contrast to some NATO contributors, Canada did not put "caveats" on where, when and how its forces were employed. Indeed, Canada deployed forces to the most dangerous Kandahar province while allies Germany, Italy and Spain tightly restricted the deployment of soldiers and did, as Roger Cohen describes, "the soft-power, school-building, Euro thing."<sup>278</sup> Canada's command of NATO's eFP battle group in Latvia demonstrates the qualitative commitment of leadership to NATO.

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<sup>272</sup> Marc Champion. Nine Charts That Explain Trump's Battle Over Defence Spending. Bloomberg.Com. July 11, 2018.

<https://www.bloombergquint.com/politics/trump-bump-or-putin-push-nato-s-defense-budget-battle-in-charts>

<sup>273</sup> Key Nato & Allied Exercises. The North Atlantic Treaty Organisation. May 2017

[https://www.nato.int/nato\\_static\\_fl2014/assets/Pdf/Pdf\\_2017\\_05/20170510\\_1705-Factsheet\\_Exercises\\_En.Pdf](https://www.nato.int/nato_static_fl2014/assets/Pdf/Pdf_2017_05/20170510_1705-Factsheet_Exercises_En.Pdf).

<sup>274</sup> Binyam Solomon. "The Demand for Canadian Defence Expenditures." *Defence And Peace Economics* 16, No. 3 (2005): 171–89. <https://doi.org/10.1080/10242690500123380>.

<sup>275</sup> John Alexander. "Canada's Commitment to Nato: Are We Pulling Our Weight?" *Canadian Military Journal* (Ottawa) 15, No. 4 (2015): 7; And Justin Massie and Benjamin Zyla. Alliance Value and Status Enhancement: Canada's Disproportionate Military Burden Sharing in Afghanistan. *Politics & Policy* 46, No. 2 (2018): 320–344.

<sup>276</sup> Zyla. (2016).

<sup>277</sup> Massie and Zyla.

<sup>278</sup> Roger Cohen. The Long Haul in Afghanistan. *The New York Times*. February 28, 2008.

Much analysis has gone into demonstrating the benefits the eFP concept has had on NATO ally solidarity and burden-sharing.<sup>279</sup> However, there has been relatively little study of how bilateral SFCB missions in Ukraine such as Canada's Op UNIFIER have done the same. Op UNIFIER demonstrated readiness and leadership with 250 deployed members making up one of the largest NATO footprints in Ukraine. Op UNIFIER started in conjunction with the US JMTG-U in Yavoriv, Ukraine and was limited to the right bank of the Dnieper River. There was no NATO effort, so Canada joined the Americans still making the "output" argument toward NATO-burden-sharing when pressed on defence spending. JMTG-U also supported SSR in transitioning Ukrainian security institutions away from past Soviet policies. This was supported by Canadian Military Police reforms and British logistics reforms. Following later rotations Op UNIFIER expanded geographically and became the most widely deployed SFCB mission in Ukraine. As noted, Canada also filled the Chief of Staff position at NATO's Multinational Coordination Centre in Kyiv as well as many of the defence advisor positions at the strategic level. Op UNIFIER personnel worked closely with NATO and with NATO allies to train Ukrainian security forces in their continuing war against Russia improving Ukrainian interoperability with NATO and eventual integration into NATO as per the 2008 Bucharest Summit Declaration. Canada accepted the risk in deploying members East to Kharkiv, North to Desna, South to Mykolaiv and Odessa and toward the borders of Donetsk oblast in vicinity of Berdyansk during the heights of Russian military escalations in April of 2021 and in November of 2021. The acceptance of risk in pursuit of increasing NATO interoperability of regional partners is a demonstration of commitment and burden-sharing the alliance. These qualitative acts are what keep Canada an integral member to the alliance and relatively free from American public acts of pressure to increase defence budgets.

Smaller, low budget NATO members like Canada also contribute symbolically to NATO collective defence.<sup>280</sup> It is difficult to judge if Ukraine is significantly closer to NATO membership after Canadian involvement. Although Op UNIFIER's impact on NATO is difficult to quantify, the symbolic benefit to NATO as a unified stand against Russian expansion with boots on the ground in Ukraine was much larger than the operation's small price tag. Canada's contribution in Ukraine also demonstrated NATO values of multilateralism and collective defence as Canada worked closely with NATO allies to develop Ukrainian partner capacity. Sometimes, on assurance missions and training missions the work is less important than simply being there. As Jeffrey Rice and Stéphanie von Hlatky argue:

What is clear is that, even though the CAF does possess limited capabilities when compared with its larger European allies, its contributions tend to be well-received and even praised, especially by its Eastern European allies. As well, there is general agreement that Canada, when it does participate, demonstrates its worth as an ally and this in turn pays off in terms of Canada's visibility within NATO.<sup>281</sup>

Op UNIFIER was evidence of Canada's NATO burden-sharing through deployment of troops, acceptance of risk and leadership. Dominika Kunertova argues Canada's NATO burden-sharing is more complicated than realist technicalities and must balance "military, economic, and moral" dimensions.<sup>282</sup> Op UNIFIER was an example of Canada fulfilling all three dimensions through military training of Ukrainian security

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<sup>279</sup> Jüri Luik and Henrik Praks, "Boosting the Deterrent Effect of Allied Enhanced Forward Presence," International Centre for Defence and Security, May 2017, [https://icds.ee/wp-content/uploads/2017/07/ICDS\\_Policy\\_Paper\\_Boosting\\_The\\_Deterrent\\_Effect\\_Of\\_Allied\\_Efp.Pdf](https://icds.ee/wp-content/uploads/2017/07/ICDS_Policy_Paper_Boosting_The_Deterrent_Effect_Of_Allied_Efp.Pdf).

<sup>280</sup> Snyder (1984); and Jens Ringsmose. *Nato Burden-Sharing Redux: Continuity and Change After the Cold War*. Contemporary Security Policy 31, No. 2 (2010): 319–38; and Jason W. Davidson, *America's Allies and War Kosovo, Afghanistan, and Iraq* (New York: Palgrave Macmillan, 2011).

<sup>281</sup> Jeffrey Rice and Stéphanie von Hlatky. "Trudeau The Reluctant Warrior? Canada And International Military Ops." In Norman Hillmer and Phillipe Lagassé, Eds. *Justin Trudeau and Canadian Foreign Policy*. Cham, Switzerland: Palgrave Macmillan, 2018. Page 295

<sup>282</sup> Dominika Kunertova. "The Canadian Politics of Fair-Share: The First Burden-Sharing Debates About Nato." *Journal Of Transatlantic Studies* 15, No. 2 (2017): 161–83. <https://doi.org/10.1080/14794012.2016.1268792>.

forces, bolstering Ukraine's economy through trade agreements and foreign investments and aid, and morally by standing up against Russia's disregard to the international order. This mission was a burden-sharing tactic at reduced cost, on a limited budget, yet also providing much value to NATO.



## **Chapter 5. Security Force Capacity Building and Op UNIFIER**

### **A History of Security Force Capacity Building**

The relatively important and effective Canadian contribution to NATO through Op UNIFIER was possible because of the nature of the mission. Military advisors and trainers have deployed in support of local security forces for the purpose of SFCB for centuries. On the American continent, French and British military advisors were dispatched to American First Nations during the French and Indian War. German and French advisors joined the Continental Army during the American Revolution. German (Prussian) advisors of the mid to late 19<sup>th</sup> century conducted SFCB in Asia and South America. To this day, the Chilean Army proudly steps in stechschritt wearing pickelhaube helmets. In the last one hundred years, more famous examples of military advising missions include the British advisors to the Arab Revolt against the Turks made famous by the tales of Lawrence of Arabia, American advisors in the Philippines during the Second World War, the Korean Military Advisory Group during the Korean War, the Military Assistance Advisory Group in Vietnam. More recently in Sierra Leone in 1999-2000 British advisors were instrumental in returning stability to a country ravaged by the brutal tactics of the Revolutionary United Front. In Afghanistan, the advising work of American Embedded Training Teams and NATO Operational Mentoring and Liaison Teams were critical pieces to NATO's ultimately doomed efforts to transform Afghanistan's security sector. Today, the US and European Union member militaries are engaged in capacity building missions in several crisis zones in Africa and the Middle East.

The Canadian Armed Forces has its own long history of SFCB starting in World War II with the British Commonwealth Air Training Program which made Canada in President Franklin Roosevelt's words the "Aerodrome of Democracy" training around 133,000 pilots for air operations.<sup>283</sup> Established in 1963, Canada's Military Training and Cooperation Program has trained security forces from 70 countries.<sup>284</sup> In the 1970's Canada was providing military training to Ghana, Tanzania, Zambia, Malaysia, Jamaica, Kenya, Uganda and Korea.<sup>285</sup> More recently in the 1990's Canadian special forces provided training for the Royal Nepalese Army.<sup>286</sup> In 2000s and 2010s Canada has supported Palestinian Authority Security Forces under Op PROTEUS; Afghan security forces under NATO Training Mission – Afghanistan; Egyptian, Lebanese, Jordanian and Iraqi Forces under Op IMPACT; Niger security forces under Op NABERIUS, Tunisian forces under Op EDIFICE and Ukrainian security forces under Op UNIFIER. Canada's history of SFCB is a long line of episodic activity with training missions established as required to meet international commitments and maintain relevancy.

NATO members set up bilateral SFCB missions in Ukraine to support the Armed Forces of Ukraine and the National Guard of Ukraine following Russia's invasion of 2014, and in Iraq likewise conducting SFCB with Iraqi government forces following the war against ISIS. In Taiwan, American special operations forces have developed the capacity of Republic of China Army forces against a looming Chinese threat. However, NATO and allies are not the only militaries conducting SFCB missions. Iran for years has provided SFCB to Hezbollah, Hamas, and other smaller groups. The USSR

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<sup>283</sup> F. J. Hatch. *Aerodrome of Democracy : Canada and the British Commonwealth Air Training Plan 1939-1945*. Ottawa, ON, CA: Minister of Supply and Services Canada, 1983.

<sup>284</sup> "Military Training and Cooperation Program." Department of National Defence. Government of Canada / Gouvernement du Canada, February 4, 2020. <https://www.canada.ca/en/department-national-defence/programs/military-training-coOp-program/directorate-military-training-cooperation/what-is-dmtc-mtcp.html>.

<sup>285</sup> Christopher R. Kilford. "The Other Cold War, Canadian Military Assistance in the Developing World", Thesis submission, Queen's University; May 2009. Page 325

<sup>286</sup> David Pugliese. *Canada's Secret Commandos : the Unauthorized Story of Joint Task Force Two*. Ottawa: Esprit de Corps Books, 2002.

maintained a mission to advise the People's Movement for the Liberation of Angola.<sup>287</sup> Russia recently has been active in SFCB across the Middle East and Africa. Russian forces and contractors (The Wagner Group) deployed as military advisors have experience in Mali, the Central African Republic, Syria and in Russian separatist held Ukraine.<sup>288</sup> In all these examples we see a common thread of a more developed security force advising a less developed force. Motivations may vary but the tactic is the same. Americans seek to provide stability in crisis zones while denying ground to Russian and Chinese exploitation. Europeans seek to provide stability on the cheap through SFCB at the source before, as they view it, the refugees flood European doorsteps. The Canadians are looking to prove their relevance as a NATO member on the international stage via a cheap commitment with somewhat tangible results.

The complicated geopolitical balance of the early 2020s has set conditions unfavourable for large Western troop deployments on stability operations. Coupled with the increasingly costly military reliance on advanced technological systems in combat units, the juice is not worth the squeeze. The prohibitive cost (political and financial) of deploying combat units makes most foreign troop deployments on direct stability operations an unrealistic option. However, following an increase in aggressive actions and postures of Russian and Chinese forces and political will to fight, there are more geopolitical hotspots demanding the attention of competing global powers namely the West. At risk of aggravating already deteriorating military situation between the West and China and Russia, it is not feasible for Canadian troops to deploy to these hotspots. By most estimates, the US and NATO too are not in a position to build up forces in these areas. This, along with fear of nuclear escalation, explains President Biden's no boots on the ground pledge. The Cold War of the last century demonstrated that war between great powers tends to be indirect via proxies. With this understanding, it can be expected that great powers have a stake in politically aligned regional partners to do the fighting, except for Russia which has demonstrated in Syria and in Ukraine a willingness to commit its regular forces directly. NATO militaries in recent years have looked toward regional partners to provide the stability they seek to maintain international order in the way preferred by the West. Although this is not a new strategy, the last decade of NATO member defence policies has seen a shift toward training local forces to fight wars and provide regional stability leaving Western blood and treasure intact. This along with fears of escalation can account for the Western world's refusal to enforce a no-fly zone over Ukraine or commit ground forces to combat operations.

SFCB is about advanced and experienced military forces making struggling military forces more skilled, capable, and proficient at their job. There are many terms to refer to the same process of a developed country deploying military advisors to a less developed country to make security forces better, but the concept remains the same. Canadians use SFCB. American conventional forces will use Security Force Assistance (SFA) or Building Partner Capacity (BPC) while their special Ops forces will use Foreign Internal Defense (FID).<sup>289</sup> NATO publications alternate between SFA and Defence and Related

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<sup>287</sup> Pikovskaia, Kristina. "'We Could Not Be There': Storytelling and the Narratives of Soviet Military Advisers, Specialists and Interpreters in Angola During the Civil War (1975-1992)." *Journal of Southern African Studies* 46, no. 5 (2020): 903–21. <https://doi.org/10.1080/03057070.2020.1797355>.

<sup>288</sup> "Central African Republic Alleges Russia Sent 'Hundreds of Troops' Amid Coup Attempt." Radio Free Europe Documents and Publications. Washington: Federal Information & News Dispatch, LLC, 2020. and "U.S. Commander Says Some 12,000 Russian Soldiers in Eastern Ukraine." Radio Free Europe Documents and Publications. Washington: Federal Information & News Dispatch, LLC, 2015. and RFE/RL. "Russian Troops Deploy to Timbuktu in Mali After Withdrawal of French Troops." Radio Free Europe Documents and Publications. Washington: Federal Information & News Dispatch, LLC, 2022. and Thornton, Rod. "Countering Prompt Global Strike: The Russian Military Presence in Syria and the Eastern Mediterranean and Its Strategic Deterrence Role." *The Journal of Slavic Military Studies* 32, no. 1 (2019): 1–24. <https://doi.org/10.1080/13518046.2019.1552655>. and David M. Herszenhorn and Peter Baker, 'Russia Steps Up Help for Rebels in Ukraine War,' *New York Times*, 25 July 2014, <https://www.nytimes.com/2014/07/26/world/europe/russian-artillery-fires-into-ukraine-kiev-says.html>

<sup>289</sup> US Department of the Army. *Field Manual (FM) 3-07*. Washington, DC: Government Printing Office, 2014. Page vi.

Security Capacity Building (DCB).<sup>290</sup> Some academics prefer “capacity development” or “foreign military training”. Andy Tamas for example argues that “building could implicitly mean that you start from nothing to build up capacities, whereas development starts from what is already there and strengthens that.”<sup>291</sup> At risk of offending authors of stability operations doctrine, these terms all mean the same thing. They all refer to process of a developed military force making a developing military force better.

This thesis, being focused on Canada’s Op UNIFIER, uses the term SFCB which is the term used by the Department of National Defence and the Canadian Armed Forces. The Canadian Army defines SFCB as “the process of increasing a host nation’s (HN) ability to achieve self-sufficiency, typically through improved governance, security, human capital, development, and reconstruction.”<sup>292</sup> SFCB is referred to as a stability operation given its intent to “assist in moving a campaign down the spectrum of conflict, and thus improve the overall security situation.”<sup>293</sup> CAF Capstone Doctrine refers to SFCB as a process of “restoration, reform, development” with a desired effect to “develop operationally effective national forces that are capable of maintaining a secure and stable environment that permits the full development of the authority of the national government.”<sup>294</sup>

SFCB has become increasingly popular both for its cost effectiveness when compared to combat unit deployments and because it can be the only responsible option for a military presence such as in Ukraine and in Taiwan. SFCB has also been used as a means of conflict prevention or to prevent a conflict from spiralling out of control. RAND scholars studying conflict prevention have argued that “building the capacity of weakened states is a critical component of crisis and conflict prevention policies...Fragile or unstable societies are thus to be empowered with the tools to deal constructively with the violent potential of future conflicts.”<sup>295</sup> While SFCB has traditionally been a SOF task in the form of “advise, assist, accompany” missions, the last decade has seen an increase in conventional forces fulfilling this role as SOF units have become overburdened with the task. The US Army has invested heavily in SFCB standing up six Security Force Assistance Brigades (SFABs) dedicated to SFCB missions.<sup>296</sup> These SFABs give the US Army a rapidly deployable body of expertise. The Commander of the US Security Force Assistance Command Brigadier-General Scott Jackson described SFCB on the Irregular Warfare podcast arguing, “it’s how you achieve your national objectives without going to war... it keeps you out of a binary world of doing nothing or doing way too much.”<sup>297</sup>

SFCB can be conducted as overtly or covertly as required depending on the situation. For example, when four Green Berets died during the Tongo Ambush in Niger it was not clear that Congress let alone the American people knew that US Special Forces were training the Niger Armed Forces

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<sup>290</sup> NATO defines Security Force Assistance as, “all NATO activities that develop and improve, or directly support, the development of local forces and their associated institutions in crisis zones.” North Atlantic Treaty Organization. Allied Joint Doctrine for Security Force Assistance. AJP-3.16A. Brussels: NATO Standardization Office, 2016. Page 1-1.

<sup>291</sup> Andy Tamas. *Warriors and Nation Builders: Development and the Military in Afghanistan*. Kingston, Ont: Canadian Defence Academy Press, 2009.

<sup>292</sup> Canadian Department of National Defence. Canadian Army Doctrine Publication. Stability Activities and Tasks. B-GL-322-010-FP-001. Page 9-1-1.

<sup>293</sup> Canadian Department of National Defence. Canadian Army Doctrine Publication. Land Ops. B-GL-300-001/FP-001. Department of National Defence, 2008. Page 7-107.

<sup>294</sup> Government of Canada. CFJP 1.0 Canadian Military Doctrine. Ottawa, ON: Department of National Defence, 2009. Pages 6-13.

<sup>295</sup> Sophie-Charlotte Brune et al. *Crisis and Conflict Prevention Strategies*. Santa Monica, CA: RAND Corporation, 2015. Page 4.

<sup>296</sup> Todd Lopez. Security Force Assistance Brigades to Free Brigade Combat Teams from Advise, Assist Mission. US Army. May 18, 2017. [https://www.army.mil/article/188004/security\\_force\\_assistance\\_brigades\\_to\\_free\\_brigade\\_combat\\_teams\\_from\\_advise\\_assist\\_mission](https://www.army.mil/article/188004/security_force_assistance_brigades_to_free_brigade_combat_teams_from_advise_assist_mission).

<sup>297</sup> Nick Lopez and Kyle Atwell, hosts. “The Practice and Politics of Security Force Assistance,” *Irregular Warfare Podcast*. 20 Nov 20. <https://mwi.usma.edu/the-practice-and-politics-of-security-force-assistance/>

alongside the French Special Forces.<sup>298</sup> This is an example of a highly covert SFCB mission. Conversely, news about personnel from Canada's Op UNIFIER in Ukraine has been broadcasted on national news in Canada, Russia and Ukraine regularly demonstrating an overt presence.<sup>299</sup> SFCB also builds military partnerships that can extend into political and economic domains. Chief amongst all advantages is that it gives the advising country a tool to influence a situation on a national or multilateral basis.

Although world history is rich with stories of military advisors influencing foreign conflicts over the centuries, the recent shift toward SFCB represents a different phenomenon rather than an extension of business as usual. Historically, SFCB missions have been enabling operations usually accompanied with large ground forces. Within the last decade, capacity building has become the main effort with most Western military forces currently deployed occupying advisor roles. The shift in importance of SFCB is now entrenched into US foreign policy.<sup>300</sup> In the Obama administration's *Sustaining U.S Global Leadership: Priorities for the 21st Century* it was stressed that America must "join with allies and partners around the world to build their capacity to promote security, prosperity and human dignity."<sup>301</sup> Donald Trump's National security strategy of 2017 also described the need for the US to build up regional partners and allies.<sup>302</sup> Despite its anti-foreign assistance rhetoric, the Trump administration, continued the trend of significant investments in SFCB in the Middle East and West Africa.

### Cost Comparison Combat vs Security Force Capacity Building

SFCB despite typically lasting longer than kinetic conflicts is much cheaper in personnel and equipment costs.<sup>303</sup> Canada spent more money on Op ATHENA in Afghanistan in FY 06/07 than all the SFCB operations of FY 21/22 combined (See Figure 1). This is mostly due to the smaller vehicle, equipment and personnel requirements compared to sustaining combat units in a campaign. As seen in Figure 2, Op REASSURANCE was much more expensive in FY 21/22 compared to Op UNIFIER. This can be explained by the larger troop commitment on Op REASSURANCE compared to Op UNIFIER. However, on a cost-per-soldier basis (~250 on UNIFIER and ~1000 on REASSURANCE) Op REASSURANCE was still more expensive than Op UNIFIER due to its equipment requirements. Tyler Wentzell argued that the ratio of advisors to Host Nation (HN) forces theoretically should decrease as the performance of the host nation security forces increases.<sup>304</sup> SFCB however is costly in time. It takes time to achieve lasting structural changes that will lead to increased regional stability. This is an issue in the fast-moving global politics of the 21<sup>st</sup> century. Wentzell addresses another important intangible cost of SFCB for Canada specifically referring to the drain of senior NCOs and junior officers leaving Canada on

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<sup>298</sup> LTC Joseph Guido. "The American Way of War in Africa: The Case of Niger." *Small Wars & Insurgencies* 30, no. 1 (2019): 176–99. <https://doi.org/10.1080/09592318.2018.1554337>.

<sup>299</sup> Sarah Turnbull. "Canada Extends Military Op in Ukraine for Three Years." CTV News. CTV News, January 27, 2022. <https://www.ctvnews.ca/politics/canada-extends-military-op-in-ukraine-for-three-years-1.5755493>. and "Місія Unifier." Ukrinform, January 29, 2022. <https://www.ukrinform.ua/tag-misia-unifier>. and Бурдейная, Автор: Елена. "Канада Направила в Украину Министра Обороны: Анита Ананд Расскажет Об Обороне: СтопКор." Информационный портал "Стопкор", January 30, 2022. <https://stopcor.org/ru/kanada-napravila-v-ukrainu-ministra-oborony-anita-anand-rasskazhet-ob-oborone/>. and "Трудно Представить, Какие Навыки Они Могут Передать": Зачем Канада Увеличивает Численность Своих Военных На Украине." RT на русском. RT на Русском, January 27, 2022. <https://russian.rt.com/ussr/article/954004-kanada-pomosch-ukraina-unifier-zelenskii>. and "Полигон НАТО: Зачем Канада Нарастивает Численность Своих Военных На Украине: Последние Новости: России, Украины, Сирии и Мира. Новости Новороссии (ЛНР, ДНР)." News Front | Последние новости на сегодня, January 28, 2022. <https://news-front.info/2022/01/28/poligon-nato-zachem-kanada-naraschivaet-chislennost-svoih-voennyh-na-ukraine/>.

<sup>300</sup> Donald Rumsfeld. *Quadrennial Defense Review Report*. Washington D.C.: Department of Defense, 2006. Page 83.

<sup>301</sup> James Q Roberts. "Building the Capabilities and Capacity of Partners: Is This Defense Business?" *Prism* (Washington, D.C.) 4, no. 2 (2013): 67.

<sup>302</sup> "National Security Strategy of the United States of America." National Archives and Records Administration, December 2017. <https://trumpwhitehouse.archives.gov/>. Page 38.

<sup>303</sup> Roberts, 65.

<sup>304</sup> Tyler Wentzell. "Security Force Capacity Building: Local Ownership Versus Human Capital." *Canadian Military Journal* (Ottawa) 12, no. 1 (2011): 20

these missions.<sup>305</sup> These soldiers are needed as much in Canada to train and develop the incoming generations of Canadian soldiers. This temporary brain drain effect is amplified when discussing SOF SFCB missions which require elite operators to deploy in a training capacity distracting them from their own training and force generation. SFCB is not always a cheap option. The US has proven in Iraq and Afghanistan that SFCB funding can increase exponentially as missions expand.

The US and NATO allies do not have free reign to deploy anywhere they want even on stability operations. With Russia in a much stronger position than it has been in the last twenty years and with significant cultural and economic interest in Ukraine, it was unfathomable to suggest NATO move in to conduct stability operations in the Donbas prior to the 2022 invasion. In the days and weeks leading up to February 24, 2022 all NATO SFCB missions withdrew from Ukraine. The US and NATO recently finished nearly two decades of combat deployments in Afghanistan ending with the Taliban regaining control. There was no political will in the West for another combat adventure against Russian separatists in the Donbas and certainly not against Russian forces in February 2022. If Canada had not sent advisors to Ukraine on SFCB missions after Russia’s annexation of Crimea and combat operations in the East, what were the alternatives to send a message to Russia and to prove it is assuming its share of NATO’s burden-sharing? Humanitarian assistance and development assistance funding does not count toward NATO spending targets. Sending weapons to Ukraine was not an option for Canada only until days before the February 2022 invasion was launched for fear of exacerbating an already deteriorated situation. Non-lethal military donations and money transfers to Ukraine could have been expanded, but their impact on the tactical situation is not direct. Op REASSURANCE could have been increased, but this mission was already Canada’s most expensive (See Figure 2) and the CAF, due to retention and recruitment issues, is reaching its capacity. Canada could increase the defence budget to the “two and twenty” targets as the Eastern NATO allies did, but this would come with political costs domestically. Without Op UNIFIER in Ukraine, Canada is spending more money to prove burden-sharing buy sending weapons and aid packages to Ukraine. However, it is hard to say if spending money can replace the intangible value of Canadian troops with Canadian flags on their shoulders in Ukraine alongside Ukrainian troops as seen before the 2022 invasion.

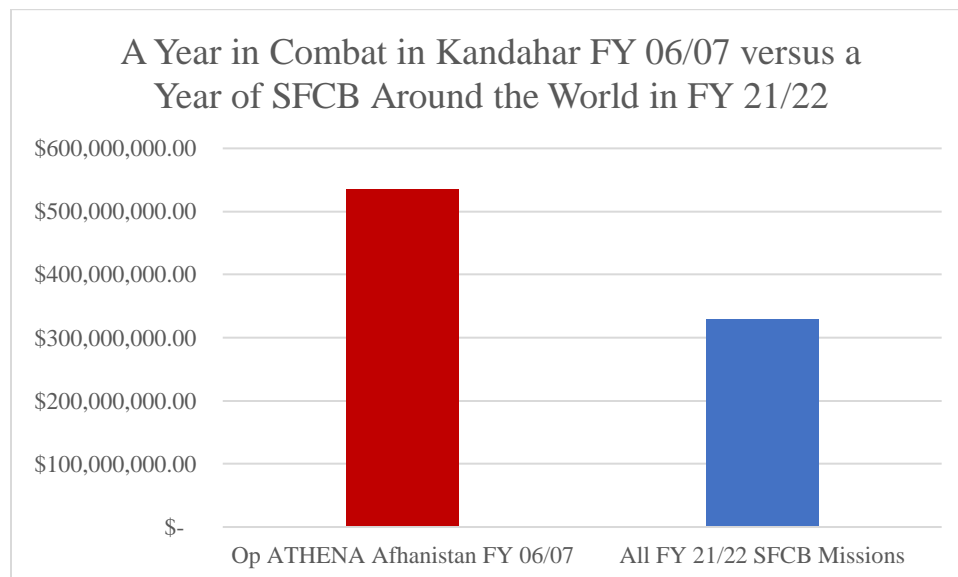


Figure 1. A Year in Combat in Kandahar FY 06/07 versus a Year of SFCB Around the World in FY 21/22. Data from Department of National Defence.

<sup>305</sup>Wentzell, 19.

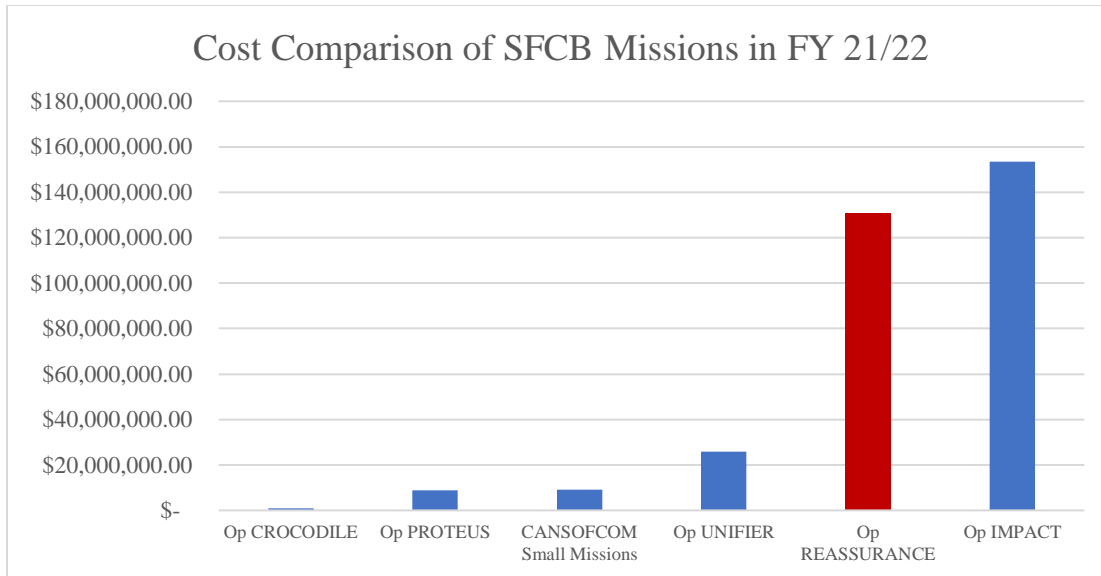


Figure 2. Cost Comparison of SFCB Missions in FY 21/22. Data from Department of National Defence.

### Problems with Security Force Capacity Building

Critics of the SFCB approach to stability operations suggest that such operations are either too small, ill-equipped, or misguided to have a transformational impact. For example, in Ukraine, Canada deployed 200 advisors to advise security forces numbering over 300 000 people. At face value, the impact of these 200 advisors is easily questionable in terms of the ability of such a small force being able to impact so many security force personnel. Mara Carlin argues that “minor tools can’t solve major problems” with respect to small SFCB missions.<sup>306</sup> Similarly, Stephen Biddle, Julia Macdonald and Ryan Baker argue that military commitment is tied to the size of the deployment arguing “small footprint, small payoff.”<sup>307</sup> Will Reno and Franky Matisek write extensively on the key issues facing SFCB.<sup>308</sup> Their main concern, a concern shared by practitioners and researchers alike, is that SFCB on the tactical level is not matched with the significant political will to push reforms resulting in failure to make structural changes necessary to achieve regional security.

Biddle et al describe SFCB as a principal-agent problem, a situation where the interests of the advisor (the principal) and the recipient (the agent) are misaligned.<sup>309</sup> The principal attempts to obtain security by developing and delegating partner force agents at less cost in blood and treasure than if they were to do it themselves. Issues arise when miscommunications lead to a gap between the advisor and the recipient. Advisors are reliant on the host nation’s commitment to the radical SSR required to achieve lasting sufficient security capacity. Biddle et al also argue that “adversely selected agents whose interests often focus on domestic power balancing commonly use US aid not to ‘work’ by professionalizing their militaries, as the US prefers, but to ‘shirk’ by reinforcing clientelism.”<sup>310</sup> SFCB operations must combine support for defence institutions with tactical training to achieve lasting results.

<sup>306</sup> Mara E Karlin. *Building Militaries in Fragile States: Challenges for the United States*. Philadelphia, PA: University of Pennsylvania Press, 2018.

<sup>307</sup> Stephen Biddle, Julia Macdonald, and Ryan Baker. “Small Footprint, Small Payoff: The Military Effectiveness of Security Force Assistance.” *Journal of Strategic Studies* 41, no. 1-2 (2018): 89–142. <https://doi.org/10.1080/01402390.2017.1307745>.

<sup>308</sup> Jahara Matisek. “Requiem for the Afghan ‘Fabergé Egg’ Army: Why Did It Crack So Quickly?” *Modern War Institute*, October 28, 2021. <https://mwi.usma.edu/requiem-for-the-afghan-faberge-egg-army-why-did-it-crack-so-quickly/>.

<sup>309</sup> Biddle et al, *Small Footprint* 94.

<sup>310</sup> *Ibid*, 103.

Lengthy SFCB operations can develop host nation reliance on SFCB advisors. Efforts can be wasted on security forces that capitulate, turn against the advising force, or commit human rights abuses without immediate support from the principal advisor state. Jahara Matisek refers to security forces such as the Afghan Armed Forces as “Fabergé Egg” armies that “boasted a glossy exterior but shattered under stress after US military advisors departed.”<sup>311</sup> Another example was the failure of Iraq’s army against the ISIL offensive in Mosul in June 2014.<sup>312</sup> Lieutenant General (Retired) James M. Dubik (US), former Commander of Multi-National Security Transition Command-Iraq warns that host nation overreliance on advisors and force enablers can leave them worse off by developing reliance on advisor support, resources and technologies.<sup>313</sup> By the end of American operations in Afghanistan, the security force establishment was so reliant on Uncle Sam that they were ineffective without consistent support. Furthermore, external actors can view long-term SFCB efforts as a threat to national security and alienate them from productive dialogue. For example, the Russian government insisted that the presence of Canadian troops and other allies in Ukraine on SFCB missions was a threat to Russian national security. SFCB operations must be selective about what forces they train picking units with aligned ethics and values. Advising and assisting host nation security forces without accompanying on operations also manages the risk of aggravating tensions with larger regional geopolitical rivals.

SFCB missions must carefully select the forces they advise and assist. Evidence of a SFCB mission advising and assisting forces with accusations of criminal or hateful activity can be devastating to the public affairs relations of the advisors. Op UNIFIER found itself in a similar predicament when a photo of Canadian soldiers next to members of the Azov Battalion (a group accused of far-right ideologies and human rights abuses in the Donbas) circulated on social media.<sup>314</sup> This unfortunate photo demonstrated the importance of public perception during SFCB missions. Unlike the US with its Leahy Law prohibiting assistance to human rights abusers, Canada does not have a similar legislative framework or oversight to prevent such groups from receiving assistance. Furthermore, the CAF and the Government of Canada do not have a duty to report such instances of assistance to human rights violators to parliament. Carleton University Professor Phillip Lagassé has argued more generally for an increase in defence scrutiny.<sup>315</sup> However, parliamentary oversight and investigative functions comes with a cost which the government is not willing to assume while its already struggling to maximize its limited defence spending on expeditionary operations.

A public affairs hit of significant magnitude can be devastating to a mission particularly vulnerable to public opinion. Unfortunately, situations arise when the only force that has the professional knowledge and capability to stabilize a crisis zone has significant accusations of human rights abuses lodged against it. The French and American SFCB operations in Mali and Cameroon have experienced blowback when soldiers trained by Western militaries committed human rights abuses using the skills they developed while undergoing Western military training. For example, an American trained Malian

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<sup>311</sup> Matisek. and Goldstein, Joseph. “Afghan Security Forces Struggle Just to Maintain Stalemate.” The New York Times, July 22, 2015. <https://www.nytimes.com/2015/07/23/world/asia/afghan-security-forces-struggle-just-to-maintain-stalemate.html>. and Remarks by Special Inspector General John Sopko at the Center for Strategic and International Studies. 13 May 2015.

<sup>312</sup> Al-salhy, Suadad, and Tim Arango. “Sunni Militants Drive Iraqi Army Out of Mosul.” The New York Times, June 10, 2014. <https://www.nytimes.com/2014/06/11/world/middleeast/militants-in-mosul.html>.

<sup>313</sup> LTG James M. Dubik. “Partner Capacity Building and U.S. Enabling Capabilities.” Front & Center. Association of the United States Army, May 2012. [https://www.usa.org/sites/default/files/FC\\_Dubik\\_0512.pdf](https://www.usa.org/sites/default/files/FC_Dubik_0512.pdf).

<sup>314</sup> David Pugliese. “Canadian Officials Who Met with Ukrainian Unit Linked to Neo-Nazis Feared Exposure by News Media: Documents.” Ottawa Citizen, November 9, 2021. <https://ottawacitizen.com/news/national/defence-watch/canadian-officials-who-met-with-ukrainian-unit-linked-to-neo-nazis-feared-exposure-by-news-media-documents>.

<sup>315</sup> Phillipe Lagassé. “Improving Parliamentary Scrutiny of Defence.” Canadian Military Journal 22, no. 3 (2022): 20-27.

army officer, Captain Amadou Sanogo, overthrew Mali's democratically elected government committing war crimes along the way.<sup>316</sup> The Bataillon d'intervention Rapide (BIR) of the Cameroonian Armed Forces which has been supported by the US in the past has also been accused of human rights abuses including torture.<sup>317</sup> These instances tarnish the reputation of the SFCB mission and can diminish popular support in the host nation and in the domestic politics of the advisor state.

Another concern is that advisors are often not deployed long enough to develop meaningful relationships with the key leaders they assist making it difficult to gain the influence required to make lasting changes to the security sector. Op UNIFIER rotated every six months. The US's Joint Multinational Training Group - Ukraine rotates every 9 months. These rotations last months, but some key relationships can take years to develop. SFCB operations are naturally inclined to increase training capacity to increase training statistics. Training statistics are valuable politically as a quantification of a state's commitment to burden-sharing. However, leaders on SFCB missions are incentivized to risk training quality in favour of training quantity. This means that advisors on the ground may not receive enough time to develop the local security forces to a high quality. Time is the enemy of SFCB operations. Significant structural transformation takes time, time that quick rotating tours of advisors may not have. Former United States Secretary of Defense Robert Gates argued that SFCB operations should last "a decade or more" to achieve lasting change.<sup>318</sup> This argument is congruent with the successes of American SFCB in cases such as Colombia. After decades of American military presence, Colombia has seen improvements in its ability to stabilize regions heavily afflicted with drug trafficking activities.<sup>319</sup> Even this mission has seen blowback when former trainees assassinated the President of Haiti in July of 2021.<sup>320</sup> However, the ultimate blow back was when the US-trained Taliban drove the Soviets out of Afghanistan in 1989 and then went on to provide safe-haven for Al-Qaeda which launched the 9/11

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<sup>316</sup> Adam Nossiter. "Soldiers Overthrow Mali Government in Setback for Democracy in Africa." *The New York Times*. March 22, 2012. <https://www.nytimes.com/2012/03/23/world/africa/mali-coup-france-calls-for-elections.html>. and Human Rights Watch. "Mali: Security Forces 'Disappear' 20, Torture Others: Crackdown on People Linked to Countercoup, Journalists." July 25, 2013. <https://www.hrw.org/news/2012/07/25/mali-security-forces-disappear-20-torture-others>. and Jeffrey York. "Training of Mali soldiers said to lack 'values, ethics, and military ethos'." *The Globe and Mail*. January 25, 2013. <https://www.theglobeandmail.com/news/world/training-of-mali-soldiers-said-to-lack-values-ethics-and-military-ethos/article7893675/>

<sup>317</sup> Robert Trafford and Nick Turse. "Cameroonian Troops Tortured and Killed Prisoners at Base Used for U.S. Drone Surveillance." *The Intercept*, July 20, 2017. <https://theintercept.com/2017/07/20/cameroonian-troops-tortured-and-killed-prisoners-at-base-used-for-u-s-drone-surveillance/>. and Ruth Maclean. "Cameroon 'Torturing People Accused of Supporting Boko Haram'." *The Guardian*. Guardian News and Media, July 20, 2017. <https://www.theguardian.com/world/2017/jul/20/cameroon-torturing-people-accused-of-supporting-boko-haram-boko-haram-amnesty-says-security-forces>. and Browne, Ryan. "US Military Launches Inquiry into Torture Allegations at Cameroon Base." *CNN*. Cable News Network, August 7, 2017. <https://www.cnn.com/2017/08/04/politics/us-military-inquiry-torture-cameroon-base/index.html>. and Ruth Maclean. "Video Shows Cameroon Army Killing Women and Children, Says Amnesty." *The Guardian*. Guardian News and Media, July 13, 2018. <https://www.theguardian.com/world/2018/jul/13/video-shows-cameroon-army-executing-women-and-children-amnesty>.

<sup>318</sup> Robert M. Gates. *Helping Others Defend Themselves*. Foreign Affairs, 2010. Page 4.

<sup>319</sup> Dana Priest and Douglas Farah. "U.S. Force Training Troops in Colombia." *The Washington Post*. WP Company, May 25, 1998. <https://www.washingtonpost.com/wp-srv/national/longterm/overseas/stories/priest0525.htm>. and Gaddis, Robert. "STRATEGIC PARTNERSHIP: Building a Strategic Special Ops Partnership: U.S. SOF in Colombia." *Special Warfare*, 2018, 68. and Dube, Oeindrila, and Suresh Naidu. "Bases, Bullets, and Ballots: The Effect of US Military Aid on Political Conflict in Colombia." *The Journal of Politics* 77, no. 1 (2015): 249–67. <https://doi.org/10.1086/679021>. and Sean Kimmons. "SFAB Unit Ready for First Mission in South America." *US Army*, June 10, 2020. [https://www.army.mil/article/236306/sfab\\_unit\\_ready\\_for\\_first\\_mission\\_in\\_south\\_america](https://www.army.mil/article/236306/sfab_unit_ready_for_first_mission_in_south_america). and U.S. Embassy Bogotá. "SFAB Mission Arrives in Colombia." U.S. Embassy in Colombia, May 28, 2020. <https://co.usembassy.gov/sfab-mission-arrives-in-colombia/>.

<sup>320</sup> Pierre Labossiere, Margaret Prescod, and Camila Valle. "The Long Haitian Revolution." *Monthly Review* (New York. 1949) 73, no. 5 (2021): 1–17. [https://doi.org/10.14452/MR-073-05-2021-09\\_1](https://doi.org/10.14452/MR-073-05-2021-09_1). and Al Jazeera. "Some Accused in Haitian Assassination Had US Military Training." *Military News | Al Jazeera*. Al Jazeera, November 3, 2021. <https://www.aljazeera.com/news/2021/7/15/some-accused-in-haitian-assassination-had-us-military-training>.



attacks to which the US responded with a twenty-year war in Afghanistan to keep them out of power which crumbled in 2021 when the Taliban again seized control of Kabul.

### **Security Force Capacity Building Situated within Security Sector Reforms**

Despite the popularity of SFCB operations, there exists a history of tragic strategic failures. SFCB failures in the past (for example Vietnam, Iraq, Afghanistan) occurred due to a range of issues of implementation. However, all three of these examples also lacked comprehensive reforms conducted at the national level. SFCB is a tactical effect that must be situated within broader strategic efforts. Within ABCA (America, Britain, Canada, Australia, New Zealand) combined doctrine, there is an emphasis on SFCB being placed within wider Security Sector Reforms (SSR).<sup>321</sup> This is reflective of the understanding that tactical effects without strategic meaning are doomed to futility because tactical excellence cannot be supported and guided by strategic confusion. Melissa Dalton and Hijab Shah argue that, “an integrated campaign approach that elevates information, diplomacy, economic incentives, and private-sector and civil society engagement tools will be far more effective than using security tools alone in countering rivals’ hybrid activities.”<sup>322</sup> A comprehensive whole of government approach is required to achieve meaningful SSR because high-level buy-in is required to sustain changes to routine operations and procedures which span from the tactical to strategic levels. This means SFCB missions must include advising and assisting systems of legitimate governance in conjunction with developing tactical forces.<sup>323</sup> The consequences of effective tactical SFCB without effective SSR is an island of competence in a sea of corruption.

For example, the Iraqi Special Operations Forces “Golden Division” was the only formation to continue the fight against ISIS in Mosul in 2016 while other soldiers fled. In the case of Afghanistan, the Afghan National Army Commando Corps conducted most of the fighting against the Taliban during America’s withdrawal while others fled or even joined forces with the Taliban mujahedeen. Critically, there was limited institutional support for these failed forces in the way of education, benefits, sufficient pay, and a decent place to raise a family. Deeply rooted corruption also fostered mistrust in senior leadership and military and government institutions. In both examples, there was a broad lack of political will and weak military institutions that could not withstand the pressures of conflict. Keith Detwiler addresses the grim reality of SFCB, that missions are entirely dependent on HN operational and strategic buy-in, arguing that tactical deficiencies are more often the result of institutional failings that cannot be addressed without strategic reforms.<sup>324</sup> Robert Gates too has been particularly critical of the American failure to address the institutional changes required to sustain the tactical improvements of SFCB efforts arguing that long-term capacity building is stunted by institutional frictions.<sup>325</sup> However Rand Corporation authors Jennifer Moroney, Jennifer, Nancy E Blacker, and Renee Buhr argue that the tactical fixes are valuable despite institutional failings as long as realistic expectations are set with the host nation partners.<sup>326</sup> Conversely, the rapid Taliban takeover of Afghanistan in 2021 demonstrated that America’s reliance on tactical improvements without the guarantee of major institutional reforms cannot guarantee long term success.

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<sup>321</sup> ABCA Publication 369. "Security Force Capacity Building Handbook." Edition 2. July 1, 2011. vi.

<sup>322</sup> Melissa Dalton, and Hijab Shah. "Partners, Not Proxies: Capacity Building in Hybrid Warfare." Center for Strategic and International Studies (CSIS), 2020. <http://www.jstor.org/stable/resrep24784>.

<sup>323</sup> Albrecht Schnabel, and Marc Krupanski. "Evolving Internal Roles of the Armed Forces: Lessons for Building Partner Capacity." Prism (Washington, D.C.) 4, no. 4 (2013): 128.

<sup>324</sup> Keith A. Detwiler. "One among many: Building Partner Capacity in a Multinational Command." US Army War College (Carlisle, Pennsylvania): 34.

<sup>325</sup> Gates, 4.

<sup>326</sup> Jennifer D. P Moroney., Nancy E. Blacker, Renee Buhr, James McFadden, Cathryn Quantic Thurston, and Anny Wong. *Building Partner Capabilities for Coalition Ops*. 1st ed. RAND Corporation, 2007. Page 23. <http://www.jstor.org/stable/10.7249/mg635a>.

## Canadian Security Force Capacity Building

SFCB is central to Canadian defence policy and foreign policy efforts. During the 2015 election, there was a resurgence in favour of an increase in peace support and capacity building operations. SFCB became a central element of the Liberal Party's plan to increase Canadian presence on the international stage with an aim to increase its share of votes of Canadians critical of the decline of Canadian peacekeeping since the 1990s. Justin Trudeau wrote in his October 2015 election platform titled a "New Plan for a Strong Middle Class", "we will lead an international effort to improve and expand the training of military and civilian personnel deployed on peace operations."<sup>327</sup> This commitment to capacity building supported by promises to increase training of foreign regional security partners was reinforced in the mandate letters to Liberal cabinet ministers and into official defence policy. In the 2015 Minister of National Defence mandate letter, Trudeau tasked Harjit Sajjan with "refocussing Canada's efforts in the region on the training of local forces and humanitarian support."<sup>328</sup> In November of 2017, Trudeau announced the creation of the Canadian Training and Advisory Team for UN training missions adding that "training support will include a Canadian Training and Advisory Team (CTAT) to work with a partner nation before — and importantly, during — a deployment to enhance the partner nation's contribution to a given mission."<sup>329</sup> Canada's defence policy *Strong, Secure, Engaged* identifies SFCB as a critical component of Canada's foreign policy with the Canadian Armed Forces tasked to, "engage in capacity building to support the security of other nations and their ability to contribute to security outside their borders."<sup>330</sup>

Canadian defence policy is centred on the CAF's ability to provide SFCB to regional partners in line with alliance objectives. Canadian SFCB is directly tied to burden-sharing as an alliance member. Former Minister of Foreign Affairs (now Minister of Finance and Deputy Prime Minister) Chrystia Freeland stated clearly that Canada conducts its burden-sharing as an ally through troop deployments on stability operations, namely SFCB, in the forward of "Strong, Secure, Engaged" writing, "Canadians have always been ready to share the burden and responsibility of making the world a safer place. We have a long history of working collaboratively with partners to prevent and respond to conflicts and crises abroad, including our support for peace and stabilization operations."<sup>331</sup> Further into *Strong, Secure, Engaged* the importance of Canada's work with the US on stabilization efforts overseas is emphasized.<sup>332</sup> SFCB is becoming a more prominent facet of defence policy. The reliance on SFCB as a foreign policy tool is an important area of study because of its prevalence in Canada's foreign policy. Today more than 70% of Canadian troops deployed on expeditionary operations under Canadian Joint Operations Command (CJOC) are conducting SFCB missions in either primary or secondary roles. Recent and ongoing Ops of a primarily SFCB focus include UNIFIER (Ukraine), EDIFICE (Tunisia), CROCODILE (Democratic Republic of Congo), NABERIUS (Niger), IMPACT (Iraq, Jordan, Lebanon), PROTEUS (Palestinian Authority Area). Operations with a secondary SFCB role include Operations REASSURANCE and PROJECTION in West Africa.<sup>333</sup>

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<sup>327</sup> Liberal Party of Canada, *Real Change: A New Plan for a Strong Middle Class*. Ottawa, Ontario: Canadian Electronic Library, 2015. Page 69. <https://liberal.ca/wp-content/uploads/sites/292/2020/09/New-plan-for-a-strong-middle-class.pdf>

<sup>328</sup> Justin Trudeau. "Archived - Minister of National Defence Mandate Letter." Prime Minister of Canada, December 13, 2019. <https://pm.gc.ca/en/mandate-letters/2019/12/13/archived-minister-national-defence-mandate-letter>.

<sup>329</sup> Justin Trudeau. "Canadian Contributions to United Nations Peace Support Ops." Prime Minister of Canada, November 15, 2017. <https://pm.gc.ca/en/news/backgrounders/2017/11/15/canadian-contributions-united-nations-peace-support-ops>.

<sup>330</sup> Government of Canada. "Strong, Secure, Engaged: Canada's Defence Policy." (Ottawa: Department of National Defence, 2017). See Figure 3 for a breakdown of CAF core missions in "Strong, Secure, Engaged".

<sup>331</sup> *Ibid*, 7.

<sup>332</sup> *Ibid*, 90.

<sup>333</sup> Canadian Department of National Defence. "*CJOC Primer: Capacity Building*." (Ottawa: Canadian Joint Ops Command, 2020). Page 3.

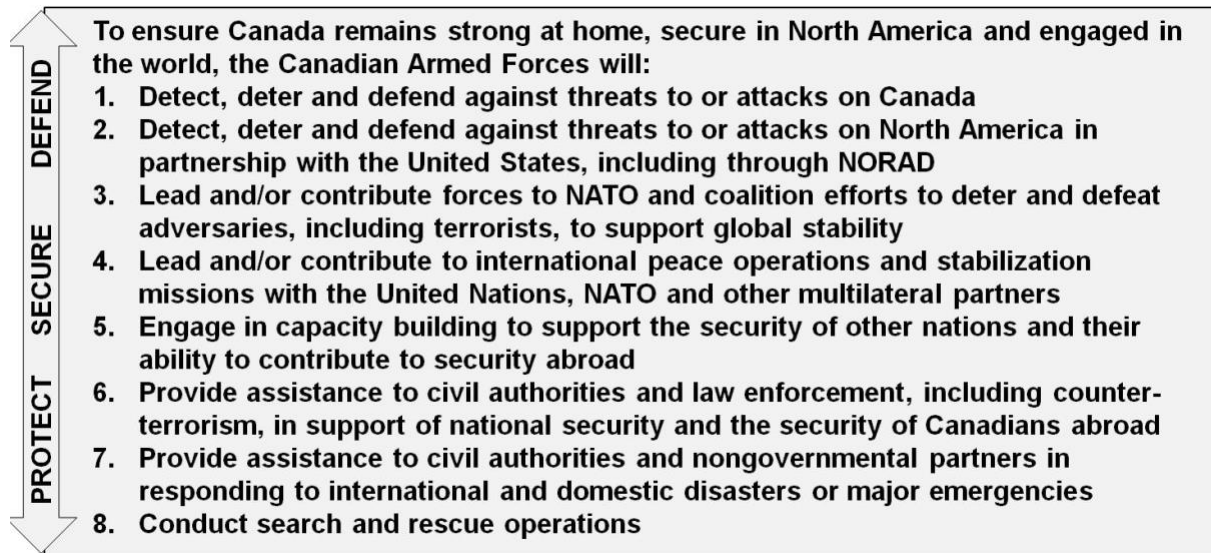


Figure 3 Canadian Armed Forces Core Missions. Government of Canada, *Strong, Secure, Engaged: Canada's Defence Policy*, 82.

The Canadian Armed Forces have structural advantages and areas of high development and expertise which make it a suitable force for SFCB operations. These include: a competent and professional corps of Non-Commissioned Officers, highly developed collective and individual training systems, NATO combined-arms tactics and institutional knowledge and experience stemming from decades of expeditionary operations. The CAF also has a variety of organizations dedicated to the development of SFCB capabilities. The Directorate of Military Training Cooperation Programme runs training with regular force and contracted personnel.<sup>334</sup> The Military Training and Cooperation Program provides training and education to foreign partners focussing on “democratic control over the armed forces, professionalism, and developing the capacity to undertake multi-lateral peace support operations.”<sup>335</sup> Canada’s Peace Support Training Centre is also busy training Canadians as well as foreign partners for peace support operations.<sup>336</sup> Canadian SFCB operations led by CJOC are currently limited to advising and assisting HN forces and restricted from accompanying on operations. Haynes, Horn, and Spencer all support the idea that SFCB efforts are improved when advisors are present on operations.<sup>337</sup> However, the “assist, advise, accompany” approach is not feasible in more globally sensitive hotspots such as Ukraine where the risk of igniting a larger conflict are real.

### Security Force Capacity Building on Op UNIFIER

Op UNIFIER has been part of Canada’s military response to Russian invasion of the Ukrainian territories of Crimea, Donetsk, and Luhansk since its launch in 2015. Joint Task Force – Ukraine (JTF-U) was the unit under CJOC tasked with conducting SFCB tasks as Op UNIFIER in Ukraine. JTF-U has trained over 30,000 security forces personnel in over 600 course serials since 2015. The mission was extended and expanded as Russian military escalation continued in early 2022. Following the increase in threat of Russian invasion in early 2022, JTF-U soldiers were moved west of the Dnieper on the 30<sup>th</sup> of

<sup>334</sup> Department of National Defence. “Military Training and Cooperation Program.”

<sup>335</sup> “The Directorate - Military Training & Cooperation | DND CAF.” Department of National Defence. Government of Canada / Gouvernement du Canada, July 26, 2013. <http://www.forces.gc.ca/en/training-international-policy/index.page>.

<sup>336</sup> Strong, Secure, Engaged, 86.

<sup>337</sup> Alex D. Haynes in Bernd Horn, and Emily Spencer. “No Easy Task: Fighting in Afghanistan.” Toronto: Dundurn, 2012. Pages 199–232.

January 2022, and it was announced that embassy staff in Kyiv were starting to withdraw.<sup>338</sup> Op UNIFIER while technically still active was relocated to Poland on February 12, 2022 and then back to Canada on March 18, 2022. All training activities are considered “paused” and will resume when conditions in Ukraine permit.

The task force consisted of 200-250 personnel rotating every six months from regular and reserve forces of diverse military trades and backgrounds as well cooperation with the Canadian Special Operations Forces Command. The task force headquarters was moved to the capital city Kyiv from the Combined Training Centre Yavoriv in Western Ukraine during the eleventh rotation in early 2021 placing Op UNIFIER closer geographically to the heart of the Ukrainian security forces highest headquarters. The mission was launched at the request of Ukrainian authorities in 2015 amid the rapid build-up of Ukrainian Security Forces. JTF-U was tasked to assist with security forces training in Ukraine. Connection between strategic level and operational level occurs with government direction and guidance through a Memo to Cabinet or through a MND letter. The goal as retired Canadian public affairs officer Tim Dunne describes it is “to enhance Ukraine’s military capacity to deal with threats to its sovereignty.”<sup>339</sup>

As CJOC describes them, SFCB Operations can have transactional or transformational end states.<sup>340</sup> A mission can be designed to develop a specific capability or structured in a way to tackle structural issues which are preventing transformative institutional change. Op UNIFIER was designed for transformation with a focus on defence policy reform and instructor development (train the trainers). It had multiple lines of effort adding up to a comprehensive approach to issues facing Ukrainian security force development. While the mission continuously developed from rotation to rotation as the situation in the Donbas changed and as the security forces progressed, Op UNIFIER had a continuous presence in collective training (observing and mentoring large exercises at battalion and brigade levels at combat training centres), individual training and education (developing, advising, assisting new courses for Ukrainian service personnel focusing on infantry, armour, artillery, combat engineers, combat medical personnel, logistics personnel, non-commissioned officers and officer cadets. Training resources were also dedicated to English language training, combined arms training, and junior leadership training. JTF-U had agreements in place to advise the Armed Forces of Ukraine (AFU) (Ministry of Defence) and the National Guard of Ukraine (NGU) (Ministry of Interior) but also worked with the State Border Guard Services of Ukraine. JTF-U was a flexible organization and received and responded to regular requests for training support from Ukrainian organizations. Each rotation was unique in the training that they provided for this reason. Engagements with multinational partners in meetings, on military exercises and at events was also an important task of JTF-U proving the solidarity of the Euro-Atlantic sphere and NATO collective defence. Presence and visibility were important to JTF-U’s work. Significant efforts were made to work with new units further East and South demonstrating Canadian support to Ukraine in the face of Russia. (See figure 2 for a visualization by LCol Pierre Leroux former commander of JTF-U’s of Op UNIFIER’s activities.)

Despite popular misconceptions, Op UNIFIER was not based solely out of Combat Training Centre Yavoriv in Ukraine’s West. JTF-U boasted over 12 outstations spread across the country centred on four major extended zones: the International Peace Support Centre (including Yavoriv and Lviv), Kamianets-Podilskyi, Kyiv (including Desna, Zhytomir, Vasylkiv, Kharkiv, Stare) and Mykolaiv (including Shyroki-Lan and Odesa). Training also occurred outside of these locations be it by mobile training teams, on combined exercises or exported courses. Canada’s presence was felt everywhere in

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<sup>338</sup> Mark MacKinnon. “Canadian Troops in Ukraine Moved West of Strategic Dnieper River, Anand Says, Amid Growing Fears of Russian Invasion.” *The Globe and Mail*, January 31, 2022. <https://www.theglobeandmail.com/world/article-canadian-troops-in-ukraine-moved-west-of-dnieper-river-anand-says-amid/>.

<sup>339</sup> Tim Dunne, “Op Unifier: Canada’s Military Training Mission in Ukraine,” *Canadian Naval Review* 12, no. 3 (2016): 16.

<sup>340</sup> CJOC Primer: Capacity Building.

Ukraine with troops actively training Ukrainian forces less than 100 km from Russian and Belarussian borders and the Line of Control in Donetsk.

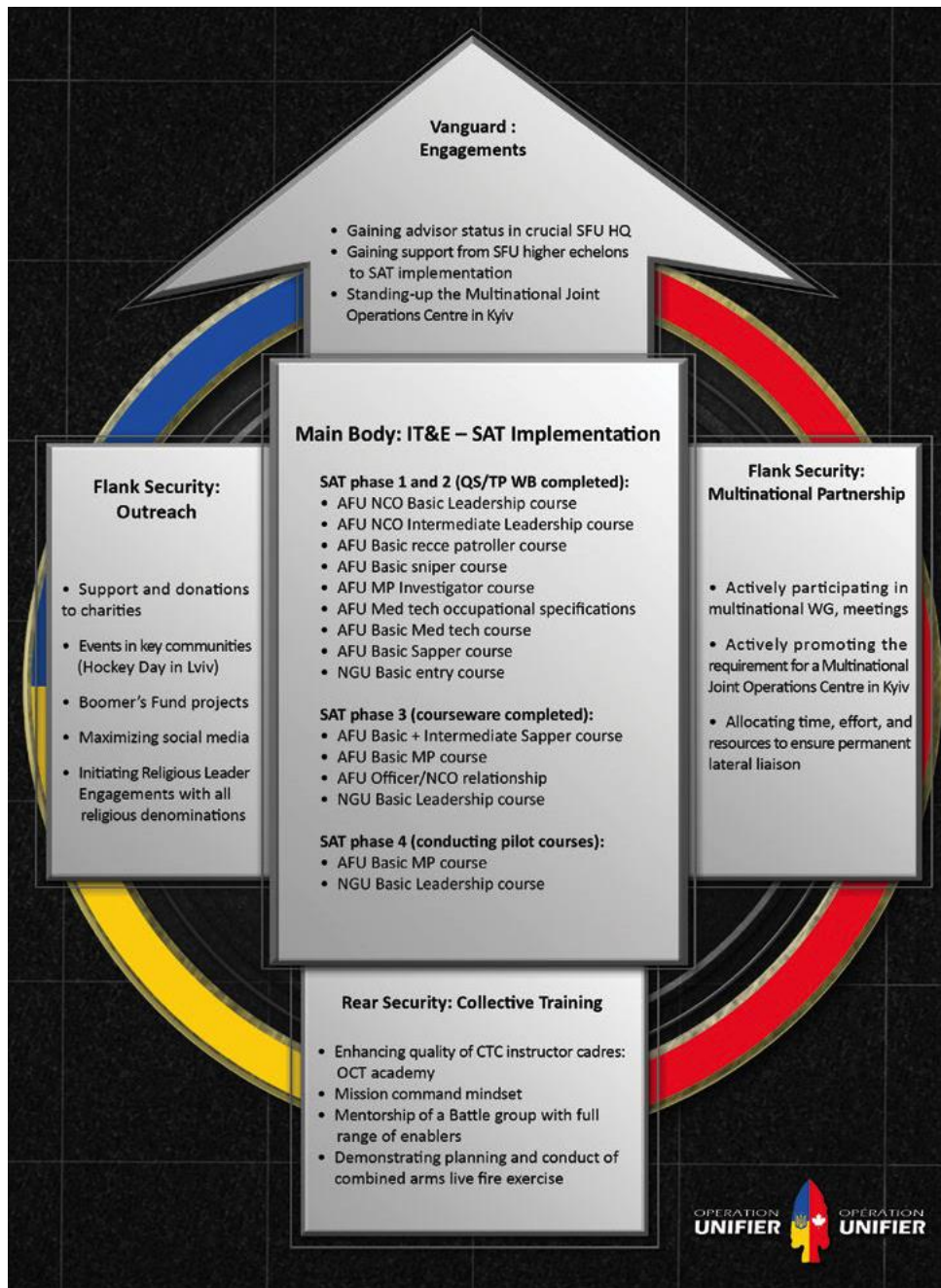


Figure 4 LCol Pierre Leroux. “Security Force Capability Building 2.0: Enhancing the Structure behind the Training.” *Canadian Military Journal* 19, no. 3 (2019): 7–14.

Canada’s support for Ukraine has been comprehensive and takes a whole of government approach. The Canadian government donates development assistance to Ukraine directed toward development of democracy, rule of law and sustainable economic growth along with humanitarian assistance. Donations of training equipment and non-lethal supplies to Ukrainian units was an important piece of OP UNIFIER’s outreach. CJOC observed over multiple missions the benefit of such donations toward SFCB efforts. On matters of Ukrainian defence reforms, Op UNIFIER worked closely with the

Department of National Defence's office of the Assistant Deputy Minister (Policy) (ADM(POL)), the Defence Review Advisory Board, the Military Training and Cooperation Program, and Global Affairs Canada (GAC) Peace and Stabilization Operations Program on strategic SSR. The strategic-level support targets defence governance (civilian control of military affairs) and building capacity of civilian defence policy, transformation of command-and-control structures, reforming professional military education, reforming military procurement systems. The end state of these efforts is to build in Ukraine a more resilient defence institution robust enough to withstand Russian hybrid tactics. On matters of peace and stabilization, Op UNIFIER was joined by the Canadian Police Mission in Ukraine and the Canada-Ukraine Policy Development Project.

Op UNIFIER was conducted in close cooperation with multinational allies and partners. This cooperation increased as the mission progressed. Since 2019, Canada worked alongside Polish, Lithuanian, Latvian, British and American missions coordinated at the MCC in Kyiv. The MJC existed as the primary point for collaboration of NATO ally missions conducting SSR and SFCB in transitioning Ukraine toward NATO interoperability. Slovakian allies also coordinate at the MCC as do NATO representatives. The Danish and Swedish personnel were embedded within Canada's JTF-U. NATO had a permanent presence within the MCC consisting of a liaison officer, an advisor to professional military education and an advisor to Non-Commissioned Officer development. NATO's Defense Education Enhancement Program (DEEP) was also active in Ukraine on matters of professional military education and NCO development. Partnership with NATO DEEP has been instrumental to Canadian progress. As former Commander of Op UNIFIER LCol Pierre Leroux has admitted, NATO DEEP gives Canada credibility in the eyes of the SFU.<sup>341</sup>

### **Op UNIFIER Progression**

Op UNIFIER started with direct training and most recently was focused mostly on developing trainers. Over 33,346 members of the Security Forces of Ukraine have participated in training with Canadians over 726 course serials. What is encouraging about these figures is that many of these Ukrainian service personnel have gone on to teach further course serials themselves with the skills and knowledge developed by Canadian advisors. Although this second order effect is not measured, it is significant.

The Systems Approach to Training (SAT) has been critical to JTF-U Ops. SAT is a needs-based approach to designing training which seeks to establish the desired product first and build the training off that end state instead of the traditional method of military training employed in Ukraine and elsewhere which has focused on the training process and conduct instead of the product. The SAT has five main phases. The "analysis" phase translates the desired outcomes into a list of performance objectives. The "design" phase starts with the performance objectives and construction of a training plan for students to meet these objectives. The "development" phase sees experts building the training material required to enact the training plan. The "implementation" phase sees the conduct of the course, and the "evaluation" phase sees the training program re-evaluated for effectiveness. Many hours of Canadian advisors' time have been spent shifting the AFU and NGU training from process-based to result based. Canadian training development officers (TDO) have been employed regularly in assisting the HN with developing curricula that focuses on the desired product.

### **The Impact of Op UNIFIER**

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<sup>341</sup> LCol Pierre Leroux. "Security Force Capability Building 2.0: Enhancing the Structure behind the Training." *Canadian Military Journal* 19, no. 3 (2019): 7-14.

NATO compatibility or interoperability is difficult to define in clear terms. There are no agreed metrics that make a particular security force compatible or not. NATO uses the Combat Readiness Evaluation of Land Headquarters and Units checklist to confirm specific standards, but these alone do not describe the force's ability to coordinate and plan in a multinational environment. With the Armed Forces of Ukraine sitting at roughly 250,000 regulars and 900,000 reservists and the National Guard of Ukraine at roughly 45,000, Canadian soldiers could train directly only a small portion of the total security forces. However, this is theoretically offset by Canada's "train the trainer" and SAT which focus on the training system not the individual students trained coupled with the strategic efforts to push for real reform in the country's security sector in conjunction with ADM (POL) and GAC. Because Canada's strategy in Op UNIFIER focused on intangibles (a positive departure from other allied missions which focus solely on training statistics) it is difficult to judge what effect Canada has had if any on Ukraine's security apparatus. If it was any indicator of good progress, Ukraine routinely requested Canada for advisors and national social media accounts and television networks broadcast the work of Canadian soldiers regularly.<sup>342</sup> Also, Ukrainian forces have fought exceptionally well against the Russian invasion since February 2022 employing Canadian-taught tactics, techniques, and procedures.

A significant critique of SFCB activities in Ukraine including Op UNIFIER was the public relations problem regarding Ukraine's crippling corruption.<sup>343</sup> The deep corruption in the Ukrainian state extends to the security forces and affects the military effectiveness of Ukrainian field forces. Ukraine has made significant political and military improvements to curb corruption and close the gap between their status quo and the Euro-Atlantic sphere in the last 8 years. However, the Secretary General of NATO and the President of the US have both expressed concerns with corruption as a barrier to Ukrainian NATO membership. Regardless of the barriers in the way of Ukraine's progress toward NATO membership and the challenges facing Op UNIFIER, Canada's presence in Ukraine demonstrated Canadian burden-sharing as a NATO member by accepting risk in deploying soldiers on SFCB in support of a regional PfP. While it cannot be precisely determined how much of Ukraine's military progress is attributable to Canada's involvement through Op UNIFIER, what matters is that Canada was prepared to help train Ukrainian security forces and accepted risk in deploying members to Ukraine in the name of regional security and in support of NATO's open-door policy.

As discussed in previous chapters, Canada is a firm supporter of NATO's Article 10 open door policy. Canada benefits from a growing NATO as Canada's NATO membership has historically been a defining feature of Canada's defence policy. Prime Minister Pierre Trudeau complained of NATO in 1968, that "we had no defence policy, so to speak, except that of NATO. And our defence policy had determined all our foreign policy. And we had no foreign policy of any importance except that of NATO."<sup>344</sup> However, within a few years his government was engaging in a significant improvement in Canada's military posture almost entirely in support of NATO roles. This focus continued into the late Cold War, post-Cold War, post-9/11 periods to the present. NATO featured prominently in Canada's 2017 defence policy *Strong, Secure, Engaged* being mentioned 69 times throughout the document and the goal to "act as a responsible, value-added partner with NORAD, NATO and Five-Eyes partners" being

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<sup>342</sup> "Національна Гвардія України." "Стандарти досконалості беруть початок тут", – представники Збройних сил Канади про Навчальний центр Нацгвардії України – Національна гвардія України, September 17, 2021. <https://ngu.gov.ua/standarty-doskonalosti-berut-pochatok-tut-predstavnyky-zbrojnyh-syl-kanady-pro-navchalnyj-centr-naczgvardiyi-ukrayiny/>.

<sup>343</sup> Ukraine ranked 122 out of 180 countries in 2021 on a corruption perception by Transparency International putting Ukraine in the bottom third of the most corrupt countries on earth. "2021 Corruption Perceptions Index - Explore Ukraine's Results." Transparency International, n.d. <https://www.transparency.org/en/cpi/2021/index/ukr>.

<sup>344</sup> "The Relation of Defence Policy to Foreign Policy," statement by Prime Minister Pierre Elliot Trudeau to the Alberta Liberal Association, Calgary, April 12, 1969, in "Canadian Foreign Policy, 1966-1976: Selected Speeches and Documents, ed. Arthur E. Blanchette (Toronto: Gage, 1980), 342-8.

listed as an essential part of Canada's defence vision.<sup>345</sup> Canada is determined to be visible on the international stage and relevant as a NATO player.

One of the factors that has made SFCB activities in Ukraine easy for Canada is that there is a broad domestic consensus in favour of it. Leaders in the Liberal, Conservative and New Democratic Parties are unanimously supportive of Op UNIFIER.<sup>346</sup> When Op UNIFIER captured national attention following Foreign Affairs Minister Mélanie Joly's visit to Kyiv on January 17, 2022, there was unanimous support across the major political parties. Political debate surrounded the utility of sending weapons to Ukraine after the UK committed to sending anti-tank weapons following the buildup of Russian forces and cyber-attacks against Ukrainian networks, but Op UNIFIER expansion was supported. As the 2022 crisis in Ukraine mounted, Trudeau announced that Op UNIFIER would be extended to March 2025 and that personnel numbers will be able to be doubled to 400 CAF personnel.<sup>347</sup> They will return to Ukraine and continue training when conditions permit. As of August 2022, Op UNIFIER (UK) is stood up in the UK where Canadian soldiers deployed there are expected to train up to 10,000 Ukrainian soldiers under the British-led multilateral Op INTERFLEX with a further 40 Canadian advisors dedicated to combat engineer capacity building for Ukrainian sappers out of Poland.

It was the escalation in tensions between Russia and Ukraine in March 2021 resurging in January 2022 leading to the invasion of February 2022 that the value of Op UNIFIER was observed. Canadian, American, Russian, and Ukrainian networks broadcasted footage of Canadian troops in Ukraine and debated the operation on their international news platforms.<sup>348</sup> This publicity of Canadian presence in Ukraine feeds the image of an engaged Canada supporting European security in unity with NATO partners. Canadian SFCB is about presence and visibility. Veterans of Op UNIFIER are familiar with the phrase popular amongst advisory group leaders, "get the flag out there". During the build-up of Russian forces prior to the invasion, Op UNIFIER attracted more public and international attention due to its proximity and thus has become the face of Canada's support for NATO and Ukraine during the Russia-Ukraine war despite other missions such as Op REASSURANCE operating directly under NATO. NATO Secretary General Jens Stoltenberg said in an interview that "Canada is one of the lead countries in NATO when it comes to providing support for Ukraine."<sup>349</sup> Op UNIFIER has featured prominently in Canadian news networks as well following the invasion with former Joint Task Force - Ukraine Commanders taking interviews with news giants CTV News, Radio Canada and CBC and with retired Comd (Ret'd) Ken Hansen writing in the *Globe and Mail* "it's the NATO education and foreign training

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<sup>345</sup> Government of Canada, Department of National Defence. *Strong, Secure, Engaged: Canada's Defence Policy*. Minister of National Defence. 2017. Page 14.

<sup>346</sup> "NDP's Statement on Ukraine." Canada's NDP, January 24, 2022. <https://www.ndp.ca/news/ndps-statement-ukraine>. and "Trudeau Must Take Immediate Action to Support Ukraine." Conservative Party of Canada, January 26, 2022. <https://www.conservative.ca/trudeau-must-take-immediate-action-to-support-ukraine-3/>.

<sup>347</sup> Department of National Defence. "Canada Extends and Expands Military and Other Support for the Security of Ukraine." Government of Canada / Gouvernement du Canada, January 26, 2022. <https://www.canada.ca/en/department-national-defence/news/2022/01/canada-extends-and-expands-military-and-other-support-for-the-security-of-ukraine.html>.

<sup>348</sup> Christopher Guly. "Canadian Defense Minister to Visit Ukraine as Canada Extends Military Training." *Kyiv Post*, January 28, 2022. <https://www.kyivpost.com/eastern-europe/canadian-defense-minister-to-visit-ukraine-as-canada-extends-military-training.html>. and Lee Berthiaume. "Canadian Troops in Ukraine Pressing Ahead with Training Mission Amid Russia Tensions." *CTV News*, January 13, 2022. <https://www.ctvnews.ca/politics/canadian-troops-in-ukraine-pressing-ahead-with-training-mission-amid-russia-tensions-1.5738995>. and Michael Taube. "Opinion | Canada Must Do More to Back Ukraine. Hashtags Are Not Enough." *The Washington Post*. WP Company, February 1, 2022. <https://www.washingtonpost.com/opinions/2022/01/30/canada-must-do-more-back-ukraine-hashtags-are-not-enough/>. and "Canada's Weapons Supplies to Ukraine Will Fuel Conflict, Russian Envoy Warns." *TASS*, January 21, 2022. <https://tass.com/world/1391197>.

<sup>349</sup> Caroline O'Neill. "Canada Making 'Huge Difference' in Ukraine with Unifier Extension: NATO Head." *CTV News*, January 29, 2022. <https://www.ctvnews.ca/politics/canada-making-huge-difference-in-ukraine-with-unifier-extension-nato-head-1.5759421>.



that Ukrainian officers and senior-enlisted ranks have been receiving since Russia's attack on Crimea in 2014 that has allowed them to out-think and outmanoeuvre their inflexible Russian adversary.”<sup>350</sup>

Russian ambassador Oleg Stepanov on CTV’s power play January 20, 2022 expressed that Russia has “many concerns” about Op UNIFIER.<sup>351</sup> The ambassador’s comments prove that Canada’s highly visible engagement in Ukraine affected Russian operations there. Professor Boris Mezhuhev of Moscow State University writes of Op UNIFIER:

Canada's military assistance is unlikely to affect the combat capability of the Ukrainian army. Yes, Russia is not happy with this, but mainly due to the presence of foreign servicemen and the increasing risk of provocations in Donbass. Ottawa participates in the process of involving Kiev in NATO orbit, in turning Ukraine into a testing ground of NATO troops. However, like the rest of the bloc members, Canada will not fight for Ukraine.<sup>352</sup>

Professor Mezhuhev’s remarks regarding Op UNIFIER are typical of Russian criticisms. Russian responses to Op UNIFIER typically involve dismissing the operation as ineffective based on the small footprint. The fact that Op UNIFIER has attracted the attention of Russian officials and academics is a success for Canada. Evidence of Ukrainian forces employing lessons learned with Canadian advisors (mission command, NCO empowerment) with success in their operations against the Russian invasion force made for great press in support of Canada’s SFCB demonstrating that with a focused and highly professional military commitment, Canada can have an effect, even if a limited one, on the international stage.

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<sup>350</sup> Ken Hansen. “Opinion: Education, Not Hardware, Is What Made the Ukrainian Military Dangerous.” *The Globe and Mail*, September 15, 2022. <https://www.theglobeandmail.com/opinion/article-education-not-hardware-is-what-made-the-ukrainian-military-dangerous/>, and Lee Berthiaume, “Canadian Military Trainers Deal with Mixed Emotions as Ukrainians Defend from Russia.” *CTV News*, March 8, 2022. <https://www.ctvnews.ca/canada/canadian-military-trainers-deal-with-mixed-emotions-as-ukrainians-defend-from-russia-1.5811015>. and *CBC News*. “Canadian Commander Who Helped Train Ukrainian Soldiers Has 'Immense Confidence' in Them.” <https://www.cbc.ca/player/play/2011381827562>. And Guy Lepage. “Luc-Frédéric Gilbert Et Alexandra Roy : S'allier Pour Défendre L'Ukraine: Segment: Tout Le Monde En Parle: Ici Radio-Canada.ca.” *Radio-Canada*, 1 Mai, 2022. <https://ici.radio-canada.ca/tele/tout-le-monde-en-parle/site/segments/entrevue/399753/guy-lepage-guerre-ukraine-poutine-international>.

<sup>351</sup> Sarah Turnbull. “Russian Ambassador to Canada Says, 'Nobody Cares' About Threat of Western Sanctions.” *CTV News*, January 21, 2022. <https://www.ctvnews.ca/politics/russian-ambassador-to-canada-says-nobody-cares-about-threat-of-western-sanctions-1.5748371>.

<sup>352</sup> “Полигон НАТО: Зачем Канада Нарращивает Численность Своих Военных На Украине: Последние Новости: России, Украины, Сирии и Мира. Новости Новороссии (ЛНР, ДНР).” *News Front | Последние новости на сегодня*, January 28, 2022. <https://news-front.info/2022/01/28/poligon-nato-zachem-kanada-narashivaet-chislennost-svoih-voennyh-na-ukraine/>.

## Conclusion

### **Canada Pulling its Weight in Ukraine**

Canada undertook a major commitment in response to Russian incursion in 2014 in support of Ukraine including deployment of Canadian military advisors to Ukraine despite Canada's lack of commitment to NATO defence budget targets. Canada's deployment of military advisors to Ukraine was a significant commitment to allied burden-sharing by contributing to NATO's defence in depth and Eastern European regional security. With Op UNIFIER active again and Canadian soldiers deployed to the UK to continue the training of Ukrainian soldiers coordinated under British Op INTERFLEX, Canada's Burdensharing efforts through deployment of soldiers continues. Canada's Op UNIFIER was a SFCB mission designed to accentuate Canada's strength of military professionalism and maximize economy of effort by training and developing leaders, instructors and training systems and programs making the security forces of Ukraine more effective at stabilizing their Eastern oblasts of Donetsk and Luhansk. In 2022, this training was used in Ukraine's defence against Russian invasion starting on 24 February.

Canada always aims for economy in its burden-sharing strategy. Op UNIFIER at roughly \$26 million per year demonstrated Canada's commitment to NATO and defence of core NATO values in a cost-effective way. Canada has challenged the idea that the size of the defence budget or its percentage of GDP, is the sole determinant of burden-sharing. Ottawa demonstrated a willingness to assume greater burdens by assuming responsibility and accepting great risks in deploying members on operations to improve NATO interoperability with regional security partner Ukraine.

Defence is a public good, non-rival and non-excludable. Military alliances such as NATO provide defence to members and as such cannot exclude members from benefiting from the good that military forces provide. Members of a military alliance participate in burden-sharing to prove their worth in the alliance and participate in collective security. However, the non-excludability of defence can theoretically contribute to a free rider effect wherein a member country's benefits exceed their commitments. If NATO continues to stand by the "two and twenty" guidelines, then two thirds of NATO's membership are effectively freeriding. However, countries like Canada also make commitments to NATO through outputs. Deployments on NATO's eFP and SFCB in regional partner countries also contribute to NATO's collective defence. All countries in NATO have competing domestic priorities and Canada is no exception. As Joel Sokolsky and Christian Leuprecht describe Canada's foreign policy, "In retail shopping terms, Canada has no need for an upscale Saks Fifth Avenue level of grand strategy when it has fared well with Walmart ... [just] enough practical utility and superficial style to keep the country secure, prosperous, and stable".<sup>353</sup>

Canada does not need to spend 2% of its GDP to contribute effectively to NATO. Input-focused burden-sharing guidelines neglect concern for individual member countries and ignore the qualitative contributions Canada makes to NATO. Canada has demonstrated its strategy of commitments in Ukraine offering significant value to NATO while below spending guidelines. If member countries are participating in NATO deployments or actively seeking to strengthen NATO's ties with regional security partners, there should be no question of how much is being spent. In Ukraine, Canada has shown that 2% does not matter when you can add value on a budget.

NATO spending is highly political at the best of times. Germany's spending increase commitments following the Russian invasion of Ukraine spelt the end of decades of defence budget restraint. Other NATO states followed. However, there was no mention of spending increase from Canada

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<sup>353</sup> Leuprecht and Sokolsky. "Defence Policy 'Walmart Style'. Page 543.

during Trudeau's post Russian invasion visit to Europe and to the front lines of NATO's eFP. Since the start of the war, Canada's leadership in NATO's eFP and in military training in Ukraine have been highly publicized. This may be explained as a distraction from discussions of Canada's defence budget. While Canada's April 7, 2022 defence budget has increased, it will not meet the 2% goal. Today, in the worst break down of relations between the West and Russia since the Cuban Missile Crisis, Canada's low defence spending is gathering attention.<sup>354</sup> Canada must contribute to burden-sharing by deployment to maintain currency and value as an alliance member. This explains the government's decision to deploy personnel to Poland to assist displaced Ukrainians. This strategy of deployment saves the government money that can be spent on more politically sensitive domestic portfolios. The tactical effects of the deployment efforts are less important than simply being present on the operation. Canada's leading role as a major contributor of advisors to Ukraine gained favour in the eyes of the alliance and contributed to the tactical successes of Ukrainian forces employing tactics, techniques and procedures in combat developed during training with Canadian Armed Forces.

However the Russian war in Ukraine ends, Canada has already achieved its aim of relevance on the international stage and commitment to alliance, continuing to secure its own seat at the table, with a small deployment of military advisors. Canada will remain relevant throughout this conflict. Just before the full-scale invasion, Ukraine's defence minister Oleksiy Reznikov tweeted "Real friends are known by deeds. Now words alone are not enough. Ukraine appreciates and remembers real friends. and Canada is one of them."<sup>355</sup> President Zelensky of Ukraine no doubt preoccupied with a war raging in his country has addressed several Western legislatures, including the Canadian parliament. This speaks to the support Canada has given to Ukraine and its relevance to the war effort. It speaks to the commitment of Canada to assume a fair, effective and highly lauded share of the allied collective defence burden even although eschewing the (questionable) two-percent solution. Allies have understandably long called for "more Canada." In Ukraine they got it.

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<sup>354</sup> Tristin Hopper. "First Reading: Canada's Perennial Status as a NATO Freeloader Is Getting Awkward." National Post, March 9, 2022. <https://nationalpost.com/news/canada/first-reading-canadas-perennial-status-as-a-nato-freeloader-is-getting-awkward>.

<sup>355</sup> Oleksii Reznikov. "Real Friends Are Known by Deeds." Twitter, February 20, 2022. [https://mobile.twitter.com/oleksiireznikov/status/1495436189297524743?ref\\_src=twsrc%5Etfw%7Ctwcamp%5Etweetembed%7Ctwterm%5E1495436189297524743%7Ctwgr%5E%7Ctwcon%5Es1\\_&ref\\_url=https%3A%2F%2Fpublish.twitter.com%2F%3Fquery%3Dhttps3A2F2Ftwitter.com2Foleksiireznikov2Fstatus2F1495436189297524743widget%3DTweet](https://mobile.twitter.com/oleksiireznikov/status/1495436189297524743?ref_src=twsrc%5Etfw%7Ctwcamp%5Etweetembed%7Ctwterm%5E1495436189297524743%7Ctwgr%5E%7Ctwcon%5Es1_&ref_url=https%3A%2F%2Fpublish.twitter.com%2F%3Fquery%3Dhttps3A2F2Ftwitter.com2Foleksiireznikov2Fstatus2F1495436189297524743widget%3DTweet).

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