

Clemens Binder

**A WAKE-UP CALL
FOR A EUROPEAN
SECURITY PROVIDER?**

EU Security and Defence Policy,
the War in Ukraine, and
the End of the Danish Opt-out

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Editor's preface

The publications of this series present new research on defence and security policy of relevance to Danish and international decision-makers. This series is a continuation of the studies previously published as CMS Reports. It is a central dimension of the research-based services that the Centre for Military Studies provides for the Danish Ministry of Defence and the political parties behind the Danish defence agreement. The Centre for Military Studies and its partners are subject to the University of Copenhagen's guidelines for research-based services, including academic freedom and the arm's length principle. As they are the result of independent research, the studies do not express the views of the Danish Government, the Danish Armed Forces, or other authorities. Our studies aim to provide new knowledge that is both academically sound and practically actionable. All studies in the series have undergone external peer review. And all studies conclude with recommendations to Danish decision-makers. It is our hope that these publications will both inform and strengthen Danish and international policy formulation as well as the democratic debate on defence and security policy, in particular in Denmark.

The Centre for Military Studies is a research centre at the Department of Political Science, University of Copenhagen. The centre conducts research into security and defence policy as well as military strategy. Read more about the centre, its activities, and other publications at: <https://cms.polsci.ku.dk/english/>.

Copenhagen, May 2024
Kristian Søby Kristensen

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List of Abbreviations

- ASAP:** Act in Support of Ammunition Production
- CARD:** Coordinated Annual Review on Defence
- CFSP:** Common Foreign and Security Policy
- CSDP:** Common Security and Defence Policy
- CDP:** Capability Development Plan
- CPCC:** Civilian Planning and Conduct Capability
- DG DEFIS:** General Directorate for Defence Industry and Space
- EC:** European Commission
- EDA:** European Defence Agency
- EDF:** European Defence Fund
- EDIDP:** European Defence Industrial Development Programme
- EDIS:** European Defence Industrial Strategy
- EDIRPA:** European Defence Industrial Reinforcement through
Common Procurement Act
- EDTIB:** European Defence Technological and Industrial Base
- EEAS:** European External Action Service
- EPF:** European Peace Facility
- ESDP:** European Security and Defence Policy
- EUAM:** EU Advisory Mission
- EUGS:** EU Global Strategy
- EUMAM:** EU Military Assistance Mission
- EUMC:** EU Military Command
- EUMS:** EU Military Staff
- EUPM:** EU Partnership Mission
- FAC:** Foreign Affairs Council
- HRVP:** High Representative for Foreign Affairs/Vice President
of the European Commission
- MFF:** Multiannual Financial Framework
- MPCC:** Military Planning and Conduct Capability
- PADR:** Preparatory Action for Defence Research

- PESCO:** Permanent Structured Cooperation
- QMV:** Qualified Majority Voting
- PSC:** Political and Security Committee
- RDC:** Rapid Deployment Capacity
- SC:** Strategic Compass

Abstract and Recommendations

The full-scale Russian invasion of Ukraine heralded the return of war to the European continent. The war in Ukraine has often been framed as a security and defence ‘wake-up call’ for the EU, as it confronted the Union with a new reality. Since February 2022, security and defence have thus transformed into high-salience issues on the EU level, with particularly the European Commission assuming an active role. However, the EU endeavouring to increase its security-providing abilities is not a mere consequence of the outbreak of the Russo-Ukrainian War; rather, political initiatives in security and defence have been ongoing since the Lisbon Treaty created the Common Security and Defence Policy (CSDP) in its current form in 2009. While Denmark had opted out of the CSDP until 2022, the opt-out was abolished in response to the Russian invasion. As the EU has been confronted with a new reality regarding security and defence, Denmark now has to find its position in a rapidly changing field. This engenders both opportunities and challenges.

Against the backdrop of the rapidly changing security environment resulting from the Russian invasion of Ukraine and the Danish decision to join the CSDP, this report analyses EU security and defence policy through two lenses. First, it investigates how the CSDP together with security and defence in a wider sense have emerged as a political field in the EU and how this has engendered political structures, institutions, and programmes. Second, it explores how the Russo-Ukrainian War has challenged and transformed existing structures. It does so by analysing major strategic documents (e.g., the Global Strategy, Strategic Compass), the institutional frameworks, and the positions and roles of member states. The main focus of the report then lies in the analysis of EU endeavours to strengthen its position as security actor through two lenses: the EU as an ‘autonomous’ and ‘global’ security actor. The first approach focuses on the wide array of political initiatives aimed at supporting the defence-capability build-up and how they strengthen the role of

the EU. The second approach attends to vehicles of global support and assistance, such as the CSDP missions or support to Ukraine through the European Peace Facility. In this context, as the major providers of security on the European continent, the EU-NATO relationship is further discussed.

The report thus focuses on the broader EU security and defence endeavours together with the specific transformations occurring in the aftermath of the full-scale Russian invasion of Ukraine. In the Danish context, this has meant detailed insight into processes generally occurring outside of Danish influence. At the same time, now that Denmark has a place at the CSDP negotiating table, it also means that it can contribute to shaping informed decisions at the EU level and adapt its politics and policies to the new framework.

Consequently, this report develops three sets of recommendations that are briefly outlined here:

Understand capability development as mutually beneficial

Having joined the CSDP, Denmark can now participate in cooperative measures under the European Defence Agency (EDA) and in other capability development processes. This renders it useful to define a strategy for these processes aimed at improving the capabilities of the Danish Armed Forces, which is profitable for Denmark on both the national and EU levels and within NATO. Here, it is necessary to balance short-term initiatives and long-term planning to maximise the impacts of these initiatives. Moreover, Denmark is part of the Permanent Structured Cooperation (PESCO), where it can become part of consortia in cooperative capability development projects. Here, the report recommends the development of a clear strategy as to which projects can be useful for Denmark and how to realise increased participation in PESCO. Similarly, engaging in research and innovation on emerging technologies through EU funds (e.g., the European Defence Fund) would allow Denmark to use its strong network of research institutions and contribute actively to European technology development.

Define a Danish position through partnerships and agenda-setting

Denmark has long-standing credibility in international action and security policy. This position is advantageous towards becoming a member state that both drives a realistic agenda while also mediating the possible differences between member states. Almost 75 years of NATO membership renders Denmark an important element in navigating the partnership between the two institutions, and the perception of Denmark as a credible but reserved member can bolster a position to achieve necessary compromises. Denmark should therefore forge strategic partnerships with EU members with shared interests. This would mean that Denmark would not remain isolated in the complex decision-making processes on CSDP matters. Instead Denmark would be able to push for its interests in cooperation with others or balance as a credible actor. Moreover, Denmark should attempt to set an agenda in fields of relevance. Denmark should identify areas of interest in terms of supporting Ukraine but also beyond, and it should seek to leverage its position to push certain topics. In this context, Denmark can rely on its strong position as a long-standing EU member that also shares a strong transatlantic perspective.

Develop an ambitious but realistic agenda for the Council Presidency in 2025

Denmark has a unique chance to leave a mark on the CSDP relatively soon after joining. With the Council Presidency coming up in the second half of 2025, Denmark could develop an ambitious agenda by making security and defence one of the priorities of its presidency. While there are obvious limits to what a Council Presidency can do due to the conflicting interests dividing member states, advancing the CSDP could possibly represent a topic with considerable chances of success. Moreover, a new Commission will be in office at the time of the Danish presidency, which is likely to have a stronger focus on security and defence. In order to define the presidency as a success, however, ambitious but realistic goals for security and defence are necessary. This means that the integration of defence efforts (especially in terms of implementing

the Strategic Compass objectives) should remain a focal point instead of lofty objectives such as a European army. Possible results could include the setting of priorities to capability development programmes and processes. Such programmes are central to the role of the EU as security provider, but they are also important instruments for member states to overcome challenges such as fragmentation or capacity shortcomings. Moreover, Denmark should balance the transatlantic partnership and the global reach of the CSDP. With the increasing unpredictability of the transatlantic partnership, Denmark's Atlanticist outlook and traditions are the ideal basis for balancing the different strategic directions of member states that vary between increased EU autonomy versus continued reliance on the transatlantic partnership.

Resumé og anbefalinger

Med Ruslands invasion af Ukraine er der igen krig i Europa. Krigen beskrives ofte som et 'wakeupcall' for EU, og forsvar og sikkerhed har siden februar 2022 stået højt på unionens politiske dagsorden. Særligt EU-Kommissionen har iværksat nye politiske initiativer. Disse forsøg på at styrke EU's rolle som sikkerhedspolitisk aktør bygger videre på en længere historik. Siden Lissabon-traktaten i 2009 etablerede EU's fælles sikkerheds- og forsvarspolitik (FSFP), er der løbende lanceret initiativer på området. Indtil 2022 deltog Danmark ikke i FSFP, men som en konsekvens af den russiske invasion af Ukraine blev EU-forsvarsforbeholdet afskaffet, og Danmark deltager nu fuldt ud i samarbejdet. Mens EU står over for en ny sikkerhedspolitisk virkelighed, skal Danmark således finde sin nye rolle i en europæisk sikkerheds- og forsvarspolitik, der er under forandring. Det skaber både udfordringer og muligheder.

Denne rapport analyserer EU's sikkerheds- og forsvarspolitik fra to vinkler. Først undersøger rapporten, hvordan EU's sikkerheds- og forsvarspolitik har udviklet sig med etableringen af forskellige strukturer, institutioner og politikprogrammer. Dernæst undersøger rapporten, hvordan disse strukturer, institutioner og programmer er blevet udfordret og forandret af Ukrainekrigen. Dette gøres med udgangspunkt i en analyse af centrale strategiske EU-dokumenter, såsom EU's Globale Strategi og Det Strategiske Kompas, samt af de institutionelle rammer og medlemslandenes positioner og roller heri. Rapportens primære fokus er derfor at anskue EU's bestræbelser på at styrke sin rolle som sikkerhedspolitisk aktør fra to perspektiver – EU som hhv. *autonom* og *global* aktør. Den første tilgang fokuserer på den brede vifte af politiske initiativer, der understøtter opbygningen af forsvarskapaciteter, herunder hvordan de styrker EU's sikkerhedspolitiske rolle. Den anden tilgang omhandler instrumenter med en udenrigspolitisk dimension, såsom FSFP-missioner eller støtten til Ukraine gennem Den Europæiske Fredsfacilitet. I den sammenhæng diskuterer rapporten desuden forholdet mellem EU og

NATO som de to primære sikkerhedspolitiske institutioner på det europæiske kontinent.

Rapporten undersøger dermed både EU's bredere sikkerheds- og forsvarspolitik og de specifikke forandringer, der har fundet sted i kølvandet på den russiske invasion af Ukraine. I en dansk kontekst betyder det, at rapporten for det første giver en detaljeret indsigt i de processer, der primært er sket uden dansk indflydelse før afskaffelsen af EU-forsvarsforbeholdet. For det andet belyser rapporten et politikområde, hvor man fra dansk side – nu hvor Danmark er fuldt med i FSFP og har en plads ved forhandlingsbordet – må tilpasse sin politik til FSFP, men samtidig også har mulighed for at påvirke beslutninger på EU-niveau. I den forbindelse formulerer rapporten tre anbefalinger, som kort beskrives her:

Forstå kapabilitetsudvikling som gensidigt fordelagtig

Ved at tilslutte sig FSFP kan Danmark nu deltage i samarbejdet under Det Europæiske Forsvarsagentur (EDA) og i andre processer vedrørende opbygningen af militære kapaciteter, herunder først og fremmest Det Permanente Strukturerede Samarbejde (PESCO). I den sammenhæng vil det være nyttigt at udarbejde en strategi for disse processer med henblik på at forbedre det danske forsvars militære kapaciteter på en måde, som både er til gavn nationalt, på EU-niveau og inden for NATO. Her er det nødvendigt at balancere kortsigtede initiativer og langsigtede planer med henblik på at maksimere effekten af disse initiativer. Med PESCO-medlemskabet kan Danmark derudover indgå i de konsortier, som samarbejder om udvikling af militære kapaciteter. Også i den forbindelse vil det være hensigtsmæssigt at udarbejde en klar strategi for, hvilke projekter der kan være nyttige for Danmark at iværksætte eller tilslutte sig, samt hvordan øget dansk deltagelse i PESCO kan realiseres. Tilsvarende vil engagement i forskning og innovation indenfor nye teknologier finansieret af EU-midler (fx under Den Europæiske Forsvarsfond) give Danmark mulighed for at udnytte sit stærke netværk af forskningsinstitutioner og blive en aktiv bidragsyder inden for europæisk teknologiuudvikling.

Fastlægge en dansk position gennem partnerskaber og dagsordensfastsættelse

Danmark er længe blevet anset som en troværdig sikkerhedspolitisk aktør. Denne position er fordelagtig i forhold til at positionere sig, så man på én og samme tid kan fremme en realistisk dagsorden og mægle mellem medlemslande med forskellige synspunkter og prioriteter. Det langvarige medlemskab af NATO gør Danmark til en potentielt vigtig brobygger i partnerskabet mellem EU og NATO. Inden for EU kan opfattelsen af Danmark som et troværdigt, men tilbageholdende medlem fremme Danmarks muligheder for at skabe nødvendige kompromisser. Derfor bør Danmark etablere strategiske partnerskaber med EU-medlemslande, som deler dets interesser. Dermed vil Danmark ikke stå isoleret i de komplekse beslutningsprocesser inden for FSFP, men i stedet være i stand til at promovere sine egne interesser i samarbejde med andre medlemslande eller forsøge at balancere forskellige interesser. Desuden bør Danmark forsøge at sætte dagsordenen på relevante områder. Danmark bør identificere muligheder for at opnå fælles fodslag, både hvad angår støtten til Ukraine og inden for øvrige prioriterede områder. I den sammenhæng kan Danmark drage fordel af sin stærke position som et langvarigt EU-medlem, der samtidig har et stærkt transatlantisk perspektiv.

Udvikle en ambitiøs, men realistisk dagsorden for EU-formandskabet i 2025

Danmark har en unik mulighed for at sætte sit præg på FSFP relativt kort tid efter at have tiltrådt samarbejdet. Med EU-formandskabet i anden halvdel af 2025 kan Danmark udvikle en ambitiøs dagsorden ved at gøre sikkerhed og forsvar til en topprioritet. Der er selvfølgelig visse begrænsninger mht., i hvor høj grad et dansk formandskab kan underbygge disse dagsordener pga. modsatrettede interesser blandt EU's medlemslande. Ikke desto mindre har dansk arbejde for at fremme FSFP potentiale til at blive en succes. Desuden vil der i 2025 være tiltrådt en ny EU-Kommission, som sandsynligvis vil have større fokus på sikkerhed og forsvar. Hvis formandskabet skal blive en succes, er det dog nødvendigt at sætte ambitiøse, men realistiske mål for sikkerheds- og forsvarspolitikken. Det betyder, at fremdrift i forhold til allerede iværksatte initiativer

på forsvarsområdet, særligt hvad angår implementeringen af målsætningerne i EU's Strategiske Kompas, bør være omdrejningspunktet, frem for urealistiske mål, såsom en fælleseuropæisk hær. Mulige resultater kunne være at opnå enighed om konkrete prioriteter i EU's programmer og processer til opbygning af militære kapaciteter. Disse programmer er centrale for EU's rolle som sikkerhedspolitisk aktør, men er også vigtige redskaber for medlemslandene mht. at overkomme udfordringer såsom politisk fragmentering eller mangel på forsvarskapaciteter. Desuden bør Danmark balancere det transatlantiske partnerskab med FSFP's globale rækkevidde. Uforudsigeligheden i det transatlantiske samarbejde betyder, at Danmarks stærke transatlantiske bånd og traditioner kan være et ideelt udgangspunkt for at balancere medlemslandenes forskellige strategiske retninger i spændet mellem mere EU-autonomi og en fortsat stærk tilknytning til USA.

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1

A Very Real Wake-up Call? EU Security and Defence after February 2022

In his speech to the plenary of the European Parliament one year after the aggressive Russian invasion of Ukraine, High Representative for the European Union for Foreign Affairs and Security Policy Josep Borrell stated:

The war in Ukraine had highlighted the importance of a common security and defence policy. It has been wake-up call for Europe, a geopolitical wake-up call.¹

The notion of the ‘wake-up call’ was a prevalent figure of speech regarding EU security in the aftermath of the Russian invasion. While the accuracy of this wide discourse about EU security and defence policy having been dormant before 24 February 2022 is debatable, it nevertheless underpins a widespread public perception: The EU, an institution constantly facing crises spanning from the Eurocrisis and financial crisis to the so-called migration crisis in 2015,² now faces the return of war right at its borders. Only three years after French President Macron

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1. EP Plenary: Speech by High Representative Josep Borrell on one year of Russia’s invasion and war of aggression against Ukraine. https://www.eeas.europa.eu/eeas/ep-plenary-speech-high-representative-josep-borrell-one-year-russia%E2%80%99s-invasion-and-war_en.
 2. Marianne Riddervold, Jarle Trondal, and Akasemi Newsome, “European Union Crisis: An Introduction,” in *The Palgrave Handbook of EU Crises*, ed. Riddervold, Trondal, and

called NATO ‘brain dead’ during the Trump presidency in the US,³ the transatlantic alliance once again emerged as the major provider of European security. The wake-up call notion thus mostly refers to a perception of a lack of EU preparedness in terms of defence capabilities and how central actors in consequence in security and defence.⁴

However, the story of the role of the EU in security and defence is much more complex than often portrayed in a public debate. In fact, ever since in 2009, when the Lisbon Treaty created the Common Security and Defence Policy (CSDP) in its current form, security and defence have received increasing attention in Brussels. Programmes such as the Permanent Structured Cooperation (PESCO), the European Defence Fund (EDF), and the European Peace Facility (EPF), all of which gained significance in the aftermath of the Russian invasion, had been implemented between 2017 and 2021. Moreover, the Global Strategy in 2016 brought forward the Strategic Autonomy proposal,⁵ which fuelled a number of structural developments but remains a highly contentious issue. This report understands the Russo-Ukrainian War not only as a wake-up call but also as a sort of *stress-test* to the already established strategies and instruments that both perpetuated but also changed the dominant narratives in the EU security and defence policy. The report hence interrogates the EU’s endeavours to expand its role as security actor against the backdrop of a changing security environment. While the Russian invasion of Ukraine was the main impetus of the EU’s changing role, the looming prospect of another Trump presidency and the politics of blockade in the US provision of aid to Ukraine have further increased the urgency in Brussels and European capitals to act. Becoming a stronger global actor is thus an overarching rationale of security policies that both engenders and shapes security and defence policy-making.

Newsome, *Palgrave Studies in European Union Politics* (Cham: Palgrave Macmillan, 2021), 3–47, https://doi.org/10.1007/978-3-030-51791-5_1.

3. Steven Erlanger, “Macron Says NATO Is Experiencing ‘Brain Death’ Because of Trump,” *New York Times*, July 11, 2019, <https://www.nytimes.com/2019/11/07/world/europe/macron-nato-brain-death.html>.
4. Daniel Fiott, “In Every Crisis an Opportunity? European Union Integration in Defence and the War on Ukraine,” *Journal of European Integration* 45, no. 3 (April 3, 2023): 447–62, <https://doi.org/10.1080/07036337.2023.2183395>.
5. Raluca Csernatonii, “The EU’s Hegemonic Imaginaries: From European Strategic Autonomy in Defence to Technological Sovereignty,” *European Security* 31, no. 3 (July 3, 2022): 395–414, <https://doi.org/10.1080/09662839.2022.2103370>.

This analysis also occurs against the backdrop of the Danish decision in June 2022 to end the Security and Defence opt-out. While Denmark is now a full CSDP member and can therefore participate in future security and defence decisions, it entered a political field that had already been set largely without Danish influence. This means that Danish policy-makers and practitioners find themselves in a new institutional framework next to the transatlantic alliance, which has long been the cornerstone of Danish security and defence policy.⁶ This report thus also provides a critical navigation of the existing frameworks and structures within the CSDP and EU security and defence policy more generally.

1.1. Background: The EU's Common Security and Defence Policy and the End of the Danish Opt-out

Security and defence were not a European Community priority during the Cold War, which allowed NATO to solidify its position as the primary security actor in Europe. However, the Maastricht Treaty in 1992 defined a Common Foreign and Security Policy (CFSP) as one of the three pillars of the European Union, and the EU became more active in the security and defence domain. With the Saint-Malo Declaration between Tony Blair and Jacques Chirac, two (then) major EU powers put forward the first proposal for stronger defence integration, which was reflected in the European Security and Defence Policy (ESDP)⁷ and the first-ever security strategy in 2003.⁸ The birth of the CSDP in its current form came with the Lisbon Treaty in 2009, which also established the institutional framework through the European External Action Service (EEAS) and the office of the High Representative (HRVP) for the Common Foreign and Security Policy. The Lisbon Treaty defined the CSDP

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6. Amelie Theussen, "European Strategic Autonomy: Opportunities and Threats for Denmark," in *European Strategic Autonomy and Small States' Security*, by Giedrius Česnakas and Justinas Juozaitis, 1st ed. (London: Routledge, 2022), 138–52, <https://doi.org/10.4324/9781003324867-10>.
 7. Andrew Shearer, "Britain, France and the Saint-Malo Declaration: *Tactical Rapprochement or Strategic Entente?*," *Cambridge Review of International Affairs* 13, no. 2 (March 2000): 283–98, <https://doi.org/10.1080/09557570008400316>.
 8. European Union, ed., *European Security Strategy: A Secure Europe in a Better World* (Luxembourg: Publications Office, 2003), <https://doi.org/10.2860/1402>.

as part of the CFSP and laid the basis for cooperative programmes (e.g., PESCO) and established the Mutual Defence Clause.

Textbox 1: The Mutual Defence Clause

“If a Member State is the victim of armed aggression on its territory, the other Member States shall have towards it an obligation of aid and assistance by all the means in their power, in accordance with Article 51 of the United Nations Charter. This shall not prejudice the specific character of the security and defence policy of certain Member States.” (Article 42.7, Treaty of the European Union)

Consequently, a more ambitious security and defence agenda was formulated through of the European Global Strategy (EUGS) in 2016 at the initiative of then-HRVP Federica Mogherini. This agenda set forth objectives including Strategic Autonomy, which have dominated the security and defence debate to date.⁹ The impact of the Global Strategy and the institutional framework engendered through the Lisbon Treaty will be discussed in the following chapters, although the EUGS has shaped the approach of the CSDP much in the direction we see today.¹⁰ The latest EU security strategy, the Strategic Compass, which was released mere weeks after Russia invaded Ukraine, substantiated and followed up on the approaches set forth in the EUGS, and it has advanced a plethora of policy initiatives through which the EU aims to strengthen its security and defence capabilities.

In the past, the Danish opt-out in security and defence matters left it on the side-lines in such political developments. Although involved in the CFSP, Denmark could not exert any sort of influence to shape the policy proposals when the CSDP came up, even after those became increasingly important in the wake of the EUGS.¹¹ Moreover, this meant

9. European Union, “Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union’s Foreign and Security Policy,” 2016, https://www.eeas.europa.eu/eeas/global-strategy-european-unions-foreign-and-security-policy_en.

10. Nathalie Tocci, *Framing the EU Global Strategy* (New York: Springer, 2017).

11. Christine Nissen, *European Defence Cooperation and the Danish Opt-out: Report on the Developments in the EU and Europe in the Fields of Security and Defence Policy and Their Implications for Denmark* (DIIS – Danish Institute for International Studies, 2020).

that Denmark was unable to profit from cooperation structures, such as the European Defence Agency (EDA), to which it first gained membership in 2023. The historic¹² Danish decision to end the opt-out after a referendum on the issue on 1 June 2022 in reaction to the Russian invasion of Ukraine means that Denmark now has opportunities to shape a policy field of growing importance in the EU and engage with its European partners. However, entering a field of play in which the rules and structures have largely been defined before Denmark became a part involves challenges; the adaption to know and understand the structures, changing political realities, and political cultures in security and defence as well as the demand for in-depth knowledge regarding the CSDP and long-standing issues.

1.2. Research Question

Against the backdrop of the changing security environment in the wake of the Russian invasion of Ukraine and considering the shift in Danish security policy towards the EU after the end of the opt-out, this report sets out to discuss two developments that shaped how security and defence are currently being governed in the EU. First, it charts the institutional and infrastructural development of security and defence since Lisbon, which established the political framework at large. This is important in order to understand the field of actors and policies within which political developments in security and defence take place. Second, against the backdrop of the larger structural analysis, this report details how the CSDP developed after 24 February 2022. Such an analysis requires a wider engagement with the structural and political prerequisites within which these developments occur, connecting the two strands of analysis. Overall, this report is interested in the positioning of the EU as a security actor, both before and after the Russian invasion of Ukraine. Hence, it addresses two main questions:

12. Adrienne Murray, "Denmark Votes to Drop EU Defence Opt-out in 'Historic' Referendum," *BBC News*, June 1, 2022, <https://www.bbc.com/news/world-europe-61644663>.

- **How has the EU's endeavour to become a stronger security and defence actor shaped the political structures and policies in security and defence?**
- **How have political discourses, structures, and programmes changed in the wake of the Russian invasion of Ukraine?**

Following these questions, the report investigates how the political rationale of the EU's position as security actor¹³ shapes the political field of security and defence, particularly since February 2022. In this sense, the report in hand engages with two prevalent narratives in which this rationale emerges: an **autonomous Europe** developing stronger capabilities, and a **global Europe** engaging in missions and support measures outside of EU territory. These narratives contribute to facilitating the initiation of political programmes focused on aspects of capability development and global action. Furthermore, as security and defence are largely intergovernmental matters that depend on member state military capabilities, shifting positions in member state security and defence policies will be scrutinised to understand the relationships between member states and EU institutions in a field that remains strongly characterised by national sovereignty.

1.3. Methodology

As a multitude of the changes in the CFSP and CSDP have occurred very recently and remain in flux, the analysis is grounded in developments until late 2023, with some exceptions. In terms of data, while the initial parts are more grounded in desk research of available documents and draw on a wide academic state of the art, the analytical sections rely strongly on interview material gathered during fieldwork in Brussels in October 2023 together with online interviews. Altogether, 12 interviews were conducted with people in different EU institutions and a diverse set of responsibilities (e.g., diplomats, officials within the Commission

13. Maria Mälksoo, "From the ESS to the EU Global Strategy: External Policy, Internal Purpose," *Contemporary Security Policy* 37, no. 3 (September 2016): 374–88, <https://doi.org/10.1080/13523260.2016.1238245>.

and respective agencies, national representatives, and military personnel) to allow for different positions and to highlight possible controversies in the political apparatus. The interviewees were chosen according to their professional rank and experience to generate comprehensive and deep knowledge of the issue. The interviews were semi-structured in the sense that they followed a questionnaire, which was open to adaption depending on the information provided. The information from interviews was triangulated with documents and an analysis of the surrounding discourses to discuss their context further and to account for the situatedness of the actors within their institutions.

For the sake of research ethics, the interviewees are all fully anonymised, although it is clarified where an interview was the source of a statement made throughout the report.

2

The Post-Lisbon CSDP and the Ambition of the Global Strategy

As mentioned in the introduction, security and defence gained traction in the wake of the Maastricht Treaty in 1992 and the European Security Strategy in 2003, which were seen as important first steps made by the EU in these policy domains. However, it was first with the Lisbon Treaty in 2009 that wide-reaching changes were formulated, establishing the CSDP framework as it is in place today. Lisbon drastically altered the institutional structure of EU security and defence policy and represents an attempt at rendering the structures of policy-making and strategic decisions more supranational. This new structure entailed the creation of an EU diplomatic service¹⁴ through the European External Action Service (EEAS), which also performs important security and defence work. Within the European Commission (EC), the office of the High Representative was handed more formal powers, becoming a Vice President of the Commission, and the EEAS and European Defence Agency represented the creation of powerful political institutions.

The impact of the Lisbon Treaty was not limited to the institutional framework of EU security and defence policy. The new framework allowed actors to assume more active roles, for example in strategic formulation through the HRVP. That particular role was interpreted differently, however, depending on who held the HRVP position. While se-

14. Ramses A. Wessel and Steven Blockmans, "The EEAS at Ten: Reason for a Celebration?," *European Foreign Affairs Review* 26, no. 1 (February 1, 2021): 5–12, <https://doi.org/10.54648/EERR2021002>.

curity and defence were interpreted as rather weak areas during the term of Catherine Ashton, the role of the HRVP became much more active when Federica Mogherini assumed office in 2014, culminating in the implementation of the Global Strategy in 2016.¹⁵ In fact, the EUGS laid the groundwork for many of the aspects that became central in the EU's re-orientation after the Russian invasion of Ukraine, and it established notable structures and strategic endeavours. Against this backdrop, this chapter thus argues that the significant changes to the CSDP and CFSP did not occur as a sole reaction to the Russo-Ukrainian War, instead they draw upon an extensive strategic and institutional setting, which had largely been in place before February 2022 and which new EU initiatives (most prominently the Strategic Compass) largely built upon. The institutional setup and strategic direction set forth in the Global Strategy therefore provide an important framework for understanding the actions of the EU to strengthen its security policy after the Russian aggressions in Ukraine.

2.1. Understanding the Post-Lisbon Institutional Setup

One general feature of studying the EU is navigating the oft-complex field of institutional arrangements and power relations. As in various other policy fields, CSDP decision-making unfolds on different levels, ranging from member state administrations to large-scale EU institutions. Institutions play different roles – the Commission and Council possess agenda-setting and strategic-planning powers, whereas entities devoted specifically to the CFSP and CSDP (e.g., the European External Action Service (EEAS) and European Defence Agency (EDA) have more day-to-day duties. They thus assume crucial roles in the everyday 'practice'¹⁶ of the CSDP through mission oversight and funding mech-

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15. Lisbeth Aggestam and Elsa Hedling, "Leaderisation in Foreign Policy: Performing the Role of EU High Representative," *European Security* 29, no. 3 (July 2, 2020): 301–19, <https://doi.org/10.1080/09662839.2020.1798411>; Antonio Calcara, "The Hybrid Role of the High Representative in the Security and Defence Field: More in 10 Months than in the 10 Years?," *European Security* 29, no. 3 (July 2, 2020): 376–95, <https://doi.org/10.1080/09662839.2020.1798406>.
 16. Rebecca Adler-Nissen, "Towards a Practice Turn in EU Studies: The Everyday of European Integration," *JCMS: Journal of Common Market Studies* 54, no. 1 (January 2016): 87–103,

anisms (e.g., PESCO and the European Peace Facility). The interplay of these various roles and tasks reflects EU ambitions to grow into a stronger security actor – it is creating a political system in which strategic setups are not exclusively a result of intergovernmental decisions, but rather from interactions between supranational EU actors and member states.¹⁷

EU policy-making institutions do not necessarily follow a streamlined path to fulfil the strategic goals; rather, CFSP and CSDP policy-making is a complex matter involving competing institutions and member states. It is therefore shaped by struggles for competences and resources as well as powers in agenda-setting. Shifts in the institutional framework are usually initiated on a larger scale, such as the institutionalisation of the EEAS and HRVP through the Lisbon Treaty, whereas the functioning of these actors is defined through their roles in the everyday policy-making and implementation processes.¹⁸ To fully grasp the complexity of the institutional framework, it is not only important to assess structures defined through treaties and policies but also to interrogate how these institutions act in their daily work. Because security and defence remain intergovernmental matters rather strictly, supranational institutions (e.g., the EEAS) must also navigate member state interests and position themselves within this field of competing powers.¹⁹

The post-Lisbon institutional framework conveyed some notable trends in structural reform. This section discusses the institutional development of the EU in security and defence against the backdrop of three trends that are important shaping factors in the institutional shifts of the CSDP. First, the institutionalisation of the HRVP and EEAS proliferated a ‘leaderisation’²⁰ of the CFSP and CSDP, both creating a

<https://doi.org/10.1111/jcms.12329>.

17. Stéphanie C. Hofmann, “Why Institutional Overlap Matters: CSDP in the European Security Architecture,” *JCMS: Journal of Common Market Studies* 49, no. 1 (January 2011): 101–20, <https://doi.org/10.1111/j.1468-5965.2010.02131.x>.
18. Niklas Bremberg et al., “The Everyday Making of EU Foreign and Security Policy,” in *The Everyday Making of EU Foreign and Security Policy: Practices, Socialization and the Management of Dissent*, ed. Niklas Bremberg et al., New Horizons in European Politics (Cheltenham: Edward Elgar, 2022), 2–11.
19. Pol Morillas, “Autonomy in Intergovernmentalism: The Role of *de Novo* Bodies in External Action during the Making of the EU Global Strategy,” *Journal of European Integration* 42, no. 2 (February 17, 2020): 231–46, <https://doi.org/10.1080/07036337.2019.1666116>.
20. Aggestam and Hedling, “Leaderisation in Foreign Policy.”

more centralised actor to assume leading functions and to assume this role publicly. Second, as many other policy domains in the EU, security, and defence have experienced a high degree of ‘agencification’,²¹ meaning the creation of Executive Agencies to fulfil important tasks in policy areas. While in the CSDP this encompasses mostly the EDA, the EEAS has also created a novel body that assumes a central role in implementing important elements of the CSDP. The third trend emerges from the long-standing issue in EU policy-making of navigating national positions in relation to the Commission’s political endeavours, rendering the negotiation processes²² in different political bodies as highly important ‘everyday’ CSDP practices. These three trends underpin much of the institutional development in security and defence, and thus serve as a useful framework for analysing structural changes.

2.1.1. Leaderisation in Security and Defence

One of the most crucial changes to the institutional structure resulting from Lisbon was the expansion of the office of the High Representative, who at the same time holds the position of European Commission Vice-President (thus the abbreviation HRVP). While an office of the High Representative for the Common Foreign and Security Policy existed before Lisbon, the addition of the Vice-President position aimed to strengthen the position as a whole.²³ The post-Lisbon HRVP has grown more powerful and central in how the Commission conducts and plans the CFSP and CSDP. In brief, the HRVP’s tasks comprise the creation of coherence in the CFSP by representing the EU as a unified actor and defining the larger strategic outlook of EU foreign and security policy. To this end, the HRVP also heads the European External Action Service (EEAS) and European Defence Agency (EDA). The role of the HRVP in security and defence has been described as ‘hybrid’ in terms

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21. Helena Ekelund, “Institutionalist Approaches to Agency Establishment,” in *The European Defence Agency: Arming Europe*, ed. Nikolaos Karampekios and Iraklis Oikonomou, Routledge Studies in European Security and Strategy (London: Routledge/Taylor & Francis Group, 2015), 11–26.
 22. Heidi Maurer and Nick Wright, “The EU’s Political and Security Committee: Still in the Shadows but No Longer Governing?,” *LSE Blog* (blog), 2021, <https://blogs.lse.ac.uk/europpblog/2021/04/01/the-eus-political-and-security-committee-still-in-the-shadows-but-no-longer-governing/>.
 23. Aggestam and Hedling, “Leaderisation in Foreign Policy.”

of representing the member states while also heading EU institutions and playing an important role within the Commission.²⁴ The HRVP is thus envisioned to work as a leader in two ways: by creating coherence among member states and defining the political lines of EU institutions.

In this sense, the European External Action Service (EEAS) plays a crucial role, as it serves as the main EU diplomatic service and a sort of ‘proto-foreign ministry’.²⁵ The tasks of the EEAS exceed diplomatic relations and representation, however, as it has a wide-ranging array of competences that work towards the day-to-day implementation of the CFSP (e.g., oversight over foreign policy instruments and missions) and CSDP. The role of the EEAS is entangled with the position of the HRVP; the EEAS is supposed to support the HRVP in their policy proposals and in providing administrative capacities to the implementation of the CFSP.²⁶ Thus, the EEAS can be interpreted as a vehicle to underpin the positioning of the HRVP as a leading figure in the CFSP. It is inextricably tied to the HRVP in terms of implementation and agenda-setting,²⁷ rendering it an institution of ever-growing importance.

The positioning of the HRVP as a leading force in the CFSP (and also in security and defence) remains a double-edged sword. On the one hand, the example of former HRVP Federica Mogherini’s endeavour to draft and implement the Global Strategy casts light on how the HRVP is able to drive strategic decisions and define the broader strategic direction of the CFSP and CSDP.²⁸ More generally, during the time Mogherini and her successor, incumbent Josep Borrell, held office, the role of the Commission grew in CSDP matters.²⁹ While the intergovernmental character of defence policy and the strong predicament of nation states

24. Calcara, “The Hybrid Role of the High Representative in the Security and Defence Field.”

25. Maurer and Wright, “The EU’s Political and Security Committee: Still in the Shadows but No Longer Governing?”

26. European Union, “Council Decision of 26 July 2010 Establishing the Organisation and Functioning of the European External Action Service,” 2010.

27. Sophie Vanhoonaeker and Karolina Pomorska, “The European External Action Service and Agenda-Setting in European Foreign Policy,” *Journal of European Public Policy* 20, no. 9 (October 2013): 1316–31, <https://doi.org/10.1080/13501763.2012.758446>.

28. Tocci, *Framing the EU Global Strategy*.

29. Calcara, “The Hybrid Role of the High Representative in the Security and Defence Field”; Calle Håkansson, “The Ukraine War and the Emergence of the European Commission as a Geopolitical Actor,” *Journal of European Integration*, 2023, 1–21, <https://doi.org/10.1080/07036337.2023.2239998>.

on this topic limit the possibilities for the HRVP to act independently, initiatives such as the European Defence Fund (EDF) have fostered the Commission's role as a whole and put the HRVP in a stronger position to define the strategic direction of the CSDP.

Conversely, while the powers of the HRVP have expanded particularly in the light of the Lisbon Treaty, the role of the position remains somewhat underdeveloped. Critics claim that 'it is not clear whether the HR/VP is an autonomous political actor or an implementor of the European Council's and the Council of the EU's decisions.'³⁰ This lies, on the one hand, in the general structural weaknesses of the CFSP in terms of the aforementioned predicament of member states, but it is also argued that there is insufficient focus on the possibilities that the HRVP could draw upon as Commission Vice-President.³¹ For instance, while Mogherini drafted the EUGS with a mandate from the European Council,³² member states later insisted that they were not involved and therefore not obliged to implement the EUGS.³³ While the office of the HRVP was therefore aimed at creating a clear leadership position assisted by the EEAS as the leading institution in foreign, security, and defence matters, structural conditions in the competition between member states and the Commission as well as the often vague formulation of competencies for the HRVP undermine this leadership. While the establishment of both the HRVP and the EEAS represent a form of 'leaderisation', this trend is still challenged, primarily by member states, meaning that the process is still in flux.

2.1.2. Agencification in Security and Defence

The emergence of executive agencies as a mode of governing is not a specific feature of security and defence; rather, it is a wider trend in EU governance aimed at centralising the governance of specific issues while

30. Maria Giulia Amadio Viceré, Giulia Tercovich, and Caterina Carta, "The Post-Lisbon High Representatives: An Introduction," *European Security* 29, no. 3 (July 2, 2020): 259–74, <https://doi.org/10.1080/09662839.2020.1798409>.

31. Ignacio Molina and Luis Simón, "A Strategic Look at the Position of High Representative and Commission Vice-President" (Madrid: Real Instituto Elcano, 2019), <https://www.realinstitutoelcano.org/en/analyses/a-strategic-look-at-the-position-of-high-representative-and-commission-vice-president/>.

32. Nathalie Tocci, "The Making of the EU Global Strategy," *Contemporary Security Policy* 37, no. 3 (September 2016): 461–72, <https://doi.org/10.1080/13523260.2016.1232559>.

33. Interview 8.

avoiding the transfer of more powers to the Commission.³⁴ One of the most prominent examples of an agency assuming a central role in the everyday practice of EU politics is Frontex, the border security agency. In security and defence, the most important – and currently singular – agency is the European Defence Agency (EDA); although the EEAS can be analytically regarded as part of the ‘agencification’, as it also assumes central operative and executive tasks. The creation of agencies to perform more executive tasks is moreover grounded in the reluctance of the Commission to deal with issues of defence that were prevalent at the time of their creation; particularly in 2004, when EDA was founded.³⁵ Since the Lisbon reforms, however, EDA has been headed by the HRVP, while the EEAS has emerged as a strong vehicle to fulfil the Commission’s strategic security and defence objectives. This underpins how agencification contributes to the complexity of powers and competences in these fields.

The EDA predates both the HRVP and EEAS, as it was founded in 2004 as a cornerstone of the CSDP, particularly focused on fostering cooperation in capability development and military cooperation. When founded, EDA was regarded as an important step for the EU to strengthen its ambitions of becoming a stronger security actor³⁶ particularly through its core tasks in capability planning. Rather than being a holistic defence agency, EDA works towards the improvement of industrial capabilities, the fostering of cooperative projects, particularly under the Permanent Structured Cooperation (PESCO), but also through Research and Development (R&D) and defining the priorities in the Capability Development Plan (CDP).³⁷ EDA’s role as agency thus emerges

34. Morten Egeberg and Jarle Trondal, “Agencification of the European Union Administration: Connecting the Dots,” TARN Working Paper, 2016, <http://www.ssrn.com/abstract=2754716>.

35. Nathalie Tocci, “Towards a European Security and Defence Union: Was 2017 a Watershed?,” *JCMS: Journal of Common Market Studies* 56, no. S1 (September 2018): 131–41, <https://doi.org/10.1111/jcms.12752>.

36. Marc R. DeVore, “Organisations at War: The EDA, NATO and the European Commission,” in *The European Defence Agency: Arming Europe*, ed. Nikolaos Karampekios and Iraklis Oikonomou, Routledge Studies in European Security and Strategy (London: Routledge/Taylor & Francis Group, 2015), 171–88.

37. European Defence Agency, “The EU Capability Development Priorities. 2018 CDP Revision” (Brussels, 2018), <https://eda.europa.eu/docs/default-source/eda-publications/eda-brochure-cdp.pdf>.

from the requirement to integrate defence capability endeavours on a European level, where EDA sees itself as the facilitator thereof.³⁸

The EDA's tasks can largely be defined **across four fields** of action: capability development, armaments cooperation, strengthening the EU defence market and the defence industrial base, as well research and technology.³⁹ It has initiated a number of programmes in these fields, such as the Coordinated Annual Review on Defence (CARD), through which the agency sets concrete actions, such as cooperative projects and, more recently, as a consequence of the Russian invasion of Ukraine, the joint procurement of military capabilities. Thus, EDA is also an important connecting point for the defence industry and strives to strengthen the industrial dimension of defence by involving industrial partners at every level of capability development.⁴⁰ In this sense, EDA serves as an agency that complements Commission endeavours, particularly in the General Directorate for Defence Industry and Space (DG DEFIS), which seeks to integrate the market dimension on a European level.⁴¹ With its tasks, EDA is a central part of the agencification of security and defence, as it represents an additional actor with ties to the Commission, albeit still independent in its long-term planning.

While in some ways similar, the EEAS is a more complex case, as it is less a clear-cut agency and more a hybrid body performing executive tasks in a more administrative-institutional structure. While the EEAS was often highlighted for its diplomatic role when first established, particularly in the light of the Russian invasion of Ukraine and the simultaneous release of the 2022 Strategic Compass, security and defence is-

38. Interview 7.

39. André Barrinha, "The EDA and the Discursive Construction of European Defence and Security," in *The European Defence Agency: Arming Europe*, ed. Nikolaos Karampekios and Iraklis Oikonomou, Routledge Studies in European Security and Strategy (London: Routledge/Taylor & Francis Group, 2015), 27–42.

40. Iraklis Oikonomou, "Brothers in Arms? The European Arms Industry and the Making of the EDA," in *The European Defence Agency: Arming Europe*, ed. Nikolaos Karampekios and Iraklis Oikonomou, Routledge Studies in European Security and Strategy (London: Routledge/Taylor & Francis Group, 2015), 43–61.

41. Raluca Csernatonu, "The EU's Defense Ambitions: Understanding the Emergence of a European Defense Technological and Industrial Complex," Carnegie Europe Working Paper (Brussels: Carnegie Europe, 2021), https://carnegieendowment.org/files/Csernatonu_EU_Defense_v2.pdf.

sues have seen increased importance.⁴² This is also a result of multiple CSDP-relevant bodies being placed within the EEAS – starting with the European Union Military Staff (EUMS) reaching to the planning capabilities for CSDP missions – both the Civil (CPCC) and Military (MPCC) Planning and Conduct Capabilities are situated within the EEAS. Moreover, the EEAS gained significance after the Russian invasion of Ukraine in 2022 by overseeing the European Peace Facility (EPF) and, thus, the provision of military aid to Ukraine. The competences in the daily ‘practicing’⁴³ of the EU’s CFSP and CSDP underlie the executive tasks of the EEAS, rendering it not only a crucial support to the HRVP but also an important institution in the conduct of security and defence policy.

The emergence of institutions such as the EDA and EEAS thus demonstrates how security and defence are shaped by multiple actors that assume more executive and implementation tasks in comparison to the more strategic leadership that the Commission (particularly through the HRVP) should perform. Understanding the new bodies in security and defence through the lens of agencification also underlines the complexity of the everyday procedures within the CSDP – from the planning of missions to the organisation of the capabilities build-up, these processes take place in very specialised units within the EDA and EEAS. In this sense, the stronger European integration of security and defence results in processes in which the EU attempts to distribute powers among centralised institutions, thereby integrating crucial processes.

2.1.3. Balancing Member State Interests and EU Endeavours

The ambitions to establish a more integrated institutional structure in security and defence notwithstanding, a large number of competences remain in the responsibilities of member states, rendering policy-making a highly intergovernmental matter. EU endeavours in capability development and the expansion of its missions rely on national defence budgets, national military forces deployed for missions, and national industries that contribute to an EU-wide industrial production. Thus, the interests

42. Fiott, “In Every Crisis an Opportunity?”

43. Christian Lequesne, “EU Foreign Policy through the Lens of Practice Theory: A Different Approach to the European External Action Service,” *Cooperation and Conflict* 50, no. 3 (September 2015): 351–67.

of the EU are at odds with the interests of member states, even though the EU attempts to underpin its leadership position through the HRVP and the centralising of core tasks. However, since the functioning of the CSDP is only possible with member states agreeing to EU initiatives, there is a need for balancing.

While strategically, the Commission attempts to set the framework, many important strategic decisions remain dependent on the European Council, where the heads of government meet, and the Foreign Affairs Council (FAC), where the foreign ministers meet. Changes to the CSFP structure have left it with little room to manoeuvre,⁴⁴ partly due to the centralisation in the Commission and the EEAS, which further shows how leaderisation creates tensions. Consequently, the permanent Brussels-based institutions (e.g., the Political and Security Committee – PSC) assume a vital role in representing member state interests. Within the PSC, the member states are all represented by their respective ambassadors to negotiate the EU’s political line and achieve compromises on CFSP and CSDP matters. For member states, the PSC thus serves as an important forum to voice their specific views and to discuss how the EU acts in security and defence, which then informs HRVP decisions. The PSC can thus best be described as an informative body in which member states articulate a common position. The PSC is permanently chaired by an EEAS representative, who articulates the HRVP positions in the PSC, enabling a direct exchange between the executive EU bodies and the member states.⁴⁵ The balancing between member state interests and EU endeavours thus also simultaneously contributes to the leaderisation and agencification by enabling the HRVP to negotiate with member states while at the same time creating an institutional structure.

Preparatory bodies, such as the PSC (but also Coreper II),⁴⁶ which gain significance through security and defence being more present topics

44. Heidi Maurer and Nicholas Wright, “Still Governing in the Shadows? Member States and the Political and Security Committee in the Post-Lisbon EU Foreign Policy Architecture,” *JCMS: Journal of Common Market Studies* 59, no. 4 (July 2021): 856–72, <https://doi.org/10.1111/jcms.13134>.

45. Interviews 1, 2, 4.

46. COREPER is the Committee of the Permanent Representatives to the EU which prepares the work of the Council. COREPER II is responsible for the CFSP and overlaps with the PSC there.

in the Council, offer crucial insight into decision-making processes.⁴⁷ As Council decisions require unanimity, the balancing of national interests with EU interests is paramount to avoid blockages. But EU representatives also attempt to strike compromises that reflect more EU-driven strategies.⁴⁸ One example of this is the Hungarian obstruction of a €500 mil aid package to Ukraine, because Ukraine blacklisted the largest Hungarian bank (OTP) for its continued operations in Russia, thereby being a “war sponsor”. This triggered debate in which a group led by Germany and France played a particularly active role about replacing unanimity with Qualified Majority Voting (QMV).⁴⁹ Moreover, the Juncker Commission argued in 2018 that the introduction of QMV would make the EU a stronger global actor.⁵⁰ This is still viewed as controversial, however, as on the one hand it is argued to render the EU more effective in security and defence, while on the other hand critics claim that it would mean both that the CFSP and CSDP would be driven much more by large member states, who often follow their own interest, and they claim it would damage the EU’s position, as it would cease to act in unity in this area.⁵¹ Decision-making through unanimity thus strengthens the negotiation structures and leaves member states in a powerful position; at the same time, strongly positioned member states can potentially obstruct EU ambitions to become a stronger security actor in cases such as the Hungarian blockade.

2.1.4. Institutional Changes and EU Actorness

The three trends presented in this section demonstrate the ambiguity in the institutional politics of the EU ambitions to strengthen its security actor position. On the one hand, through leaderisation and agencification, there is a clear orientation towards establishing EU structures

47. Maurer and Wright, “Still Governing in the Shadows?”

48. Ibid.

49. European Parliament Research Service, *Qualified Majority Voting in Common Foreign and Security Policy: A Cost of Non Europe Report*. (Brussels: Publications Office, 2023), <https://data.europa.eu/doi/10.2861/509043>.

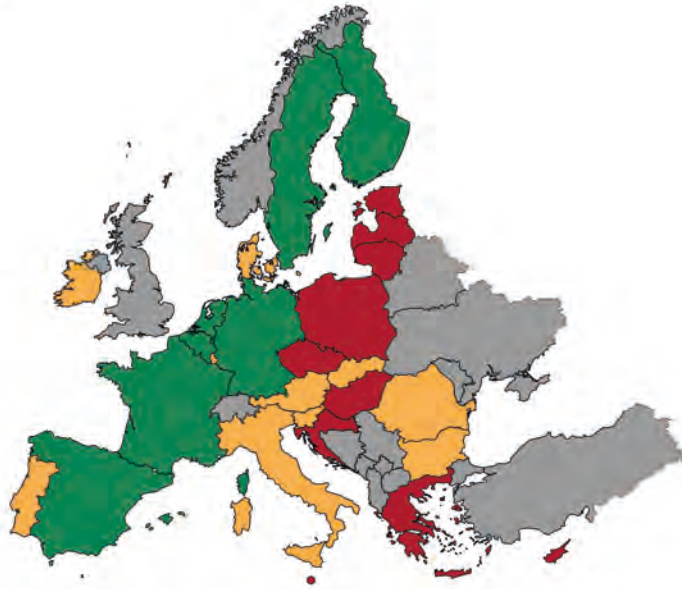
50. European Commission, “Communication from the Commission to the European Council, European Parliament and the Council: A Stronger Global Actor: A More Efficient Decision-Making for EU Common Foreign and Security Policy,” 2018, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018DC0647>.

51. Interviews 1, 2.

Figure 1: Member State Positions on the Extension of QMV to CFSP/CSDP Matters⁵²

Position towards
QMV in CFSP/CSDP
matters

- In favour
- Ambiguous or
Sceptical
- Opposed
- non-EU members



that not only assist member states but assume the strategic lead and, consequently, define the political direction of EU security and defence policy. On the other hand, member states remain the principal agents within the CSDP through the provision of national capabilities for policy measures and missions. Moreover, the required unanimity in decision-making requires a balance between the EU as security actor and the member states as the defining factor in the CSDP. In this sense, structural changes and institutional politics must be understood against the backdrop of these three ambiguous trends that simultaneously shape an institutional network and are the result of larger, EU-level political shifts.

52. Map created by author, data from: Nicole Koenig, “Towards QMV in EU Foreign Policy Different Paths at Multiple Speeds,” Policy Brief (Berlin: Hertie School, Jacques Delors Centre, 2022), https://www.delorscentre.eu/fileadmin/2_Research/1_About_our_research/2_Research_centres/6_Jacques_Delors_Centre/Publications/20221014_Koenig_QMV_V1.pdf

2.2. The Global Strategy as 'Grand Strategy' of Foreign and Security Policy

With the 2003 ESS, the EU was entering uncharted territory in formulating its own security strategy. While revolutionary at the time for being the first-ever EU security strategy, the ESS was a product of the security environment in the early 2000s, which was considered outdated once the Lisbon Treaty changes were implemented.⁵³ Federica Mogherini (HRVP from 2014-2019) thus initiated the formulation of a new strategy: the Global Strategy. This strategy aimed to reflect the extended powers of the EU in strategic planning through the office of the HRVP and the EEAS while also reacting to the changed security environment after the Arab Spring, the wars in Libya and Syria, and the illegal Russian annexation of Crimea.⁵⁴ Furthermore, it encompassed issues that were traditionally not within the realm of foreign and security policy (e.g., migration, terrorism), which at the time were priorities in the European discourse.

In this environment, Mogherini aimed for a strategy that extended a purely European perspective on security; rather, with the EUGS, she sought to formulate what some labelled a 'grand strategy'⁵⁵ of foreign policy and the position of the EU in the world. For two reasons, the strategy can also be viewed as a product of the shifting institutional framework. First, the EUGS aimed at giving sense to the new institutions by fostering strategic thinking, 'because it forces a fragmented policy bureaucracy to think imaginatively about how the world works and what their nation can achieve.'⁵⁶ Second, the EUGS underlined the agenda-setting competences; particularly of the HRVP, as it was a product

53. Tocci, *Framing the EU Global Strategy*.

54. Tocci, "The Making of the EU Global Strategy."

55. Sven Biscop, "The Lonely Strategist: Who but the High Representative and the EEAS Cares about the EU Global Strategy?," *European Foreign Affairs Review* 26, no. 1 (February 1, 2021): 25–34, <https://doi.org/10.54648/EERR2021004>; Monika Sus, "Supranational Entrepreneurs: The High Representative and the EU Global Strategy," *International Affairs* 97, no. 3 (May 10, 2021): 823–40, <https://doi.org/10.1093/ia/iab037>.

56. James Goldgeier and Jeremi Suri, "Revitalizing the U.S. National Security Strategy," *The Washington Quarterly* 38, no. 4 (October 2, 2015): 35–55, <https://doi.org/10.1080/0163660X.2015.1125828>.

of Mogherini's endeavours to formulate such a strategy.⁵⁷ This, however, raised a vexing problematique: The member states did not adopt the EUGS despite agreeing on it, as they argued that they were not involved in the setup of the strategy.⁵⁸

However, while 'traditionally, the European Commission was unwilling to touch defence issues',⁵⁹ the shifting strategic environment in the 2010s fostered an EU approach to security and defence. On the one hand, the Arab Spring, the ensuing wars in Syria and Libya, and Russia's illegal annexation of Crimea rendered the EU's neighbourhood more unstable. On the other hand, the Brexit vote, which cost the EU one of its main security actors, spurred cooperation among other member states, notably France and Germany, together with a push by the Commission to become more active in security and defence matters.⁶⁰

The EUGS has marked a tangible shift in priorities, as it underlines the more vital role of security and defence in the EU's political priorities. In so doing, the EUGS marks a slight deviation from conceptualising the EU purely as a 'normative power'⁶¹ in foreign and security policy with a more realist understanding of the importance of the global strategic environment for the EU as a security actor.⁶² While some elements of the EU as a normative power remain in the sense that its actions are proclaimed to be value-driven, it focuses much more on the security of the Union. This is reflected in the five strategic priorities set forth in the EUGS (see Table 1).

In this sense, the EUGS scope underpins its claim to being a broader foreign policy strategy⁶³ while simultaneously framing security and de-

57. Pol Morillas, "The Policy-Making of the European Union Global Strategy (2016)," in *Strategy-Making in the EU*, by Pol Morillas (Cham: Springer International Publishing, 2019), 133–79, https://doi.org/10.1007/978-3-319-98627-2_5.

58. Interview 8.

59. Tocci, "Towards a European Security and Defence Union", 113.

60. Lucie Béraud-Sudreau and Alice Pannier, "An 'Improbable Paris-Berlin-Commission Triangle': Usages of Europe and the Revival of EU Defense Cooperation after 2016," *Journal of European Integration* 43, no. 3 (April 3, 2021): 295–310, <https://doi.org/10.1080/07036337.2020.1740215>; Tocci, "Towards a European Security and Defence Union."

61. Ian Manners, "Normative Power Europe: A Contradiction in Terms?" *JCMS: Journal of Common Market Studies* 40, no. 2 (June 2002): 235–58, <https://doi.org/10.1111/1468-5965.00353>.

62. Karen E. Smith, "A European Union Global Strategy for a Changing World?" *International Politics* 54, no. 4 (July 2017): 503–18, <https://doi.org/10.1057/s41311-017-0041-0>.

63. Morillas, "The Policy-Making of the European Union Global Strategy (2016)."

fence as major instruments available to the EU to achieve credibility in its global endeavour. The EUGS argues that in order to 'respond to external crises, build our partners' capacities and protect Europe, Member States must channel a sufficient level of expenditure to defence',⁶⁴ creating a rationale for programmes in capability development through the Permanent Structured Cooperation (PESCO) research and innovation, which later materialised in the European Defence Fund (EDF). This rationale is further reified through the repeated vision of 'strategic autonomy' – broadly conceived as the ability of the EU to reduce its dependency on allies, such as the United States, in matters of defence.⁶⁵ The EUGS thus contributed to strategic autonomy – a concept that will be discussed at length later in this report – emerging as one of the cornerstones of EU security and defence policy. Consequently, the EUGS fostered prevalent discourses in security and defence while also laying the groundwork for initiatives that saw greater significance in the aftermath of the February 2022 Russian invasion of Ukraine.

64. European Union, "Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign And Security Policy", 44.

65. Dick Zandee et al., "European Strategic Autonomy in Security and Defence: Now the Going Gets Tough, It's Time to Get Going," Clingendael Report (The Hague: Clingendael, 2020), <https://www.clingendael.org/publication/european-strategic-autonomy-security-and-defence>.

Table 1: The Priorities for Global Action in the EUGS⁶⁶	
<i>The security of our Union</i>	Security and Defence are regarded as crucial prerequisites for the global position of the EU. While remaining slightly nebulous, this priority underpins all EU efforts at establishing itself as a security and defence actor to complement NATO.
<i>State and societal resilience to our east and south</i>	The global approach of the EUGS becomes visible in this section. Stability in regions 'from Central Asia to Central Africa' are seen as paramount for EU security. Both the Neighbourhood Policy and Enlargement Policy are therefore framed as security instruments, as is a global approach to migration management. ⁶⁷ This also signifies a departure from the more traditional policy fields of security and defence, as well as the integration of economic and internal security means.
<i>An integrated approach to conflicts and crises</i>	One distinct feature of the EUGS is how it frames crises in regions outside Europe as a threat to EU security, thereby justifying EU engagement in peacebuilding and conflict settlement. CSDP missions are presented as a measure to provide assistance, although the strategy remains vague in this regard.
<i>Cooperative regional orders</i>	This section lays out central guidelines for global EU operations in relation to other regional powers and how this is envisioned to contribute to regional security and a 'European Security Order'. These strategic points have lost validity, however; for example, cooperation with Russia is still formulated as an option in some cases in the EUGS. Other aspects, such as stronger transatlantic relations and increased engagement in Africa, are much more visible in the reaction to the Russian invasion of Ukraine, and they are also discernible in the Strategic Compass.
<i>Global governance in the 21st century</i>	While reducing the significance of being a 'normative power', the EUGS still promotes the EU as the protector of a rules-based global order and a role-model and central actor in this matter. Global action, as proposed in the EUGS through global investments, nuclear non-proliferation, and/or civil society engagement, is laid out as the main instrument for achieving a specific global order.

66. European Union, "Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign And Security Policy."

67. European Commission, "Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A European Agenda on Migration," 2015.

2.3. Back on the Agenda? How Lisbon and the EUGS Shaped the CSDP

This section has shown how current discussions about the CSDP are grounded in more long-standing political developments and already established institutional frameworks. The EUGS shifted priorities and defined strategic fields of action; most prominently in strategic autonomy, but also in terms of crisis management. While the EUGS was more globally oriented than the ensuing Strategic Compass (which mostly complemented the EUGS in security and defence; see following section), it centred security within the EU as a main rationale for action.⁶⁸ One key weakness of the EUGS, however, was that member states never had to ratify it; rather, it was the guidelines set forth by HRVP Mogherini, by which member states often did not fully abide.⁶⁹ Moreover, it was still seen as more of a foreign policy strategy than a focussed defence strategy, rendering the Strategic Compass necessary.⁷⁰ With this, the EUGS also reveals the lingering complexity in the actor-structures in the CFSP and CSDP, where member states and the Commission are often at odds; however, with the increasing importance of the HRVP, more influence has shifted to the supranational level. Ursula von der Leyen's announcement to render her Commission 'geopolitical'⁷¹ underscores how the Commission seeks to increase its influence in security and defence, thereby challenging the strictly intergovernmental nature of this political field. Thus, those tensions shape policy-making and are an important basis for understanding political processes in the realm of EU-level security and defence.

68. Jolyon Howorth, "The EU's Security and Defence Policy: A New Leap Forward?" in *International Relations and the European Union*, ed. Christopher Hill, Michael Smith, and Sophie Vanhoonacker, 4th ed., The New European Union Series (Oxford: Oxford University Press, 2023), 281–304.

69. Interview 8.

70. Ibid.

71. Pierre Haroche, "A 'Geopolitical Commission': Supranationalism Meets Global Power Competition," *JCMS: Journal of Common Market Studies* 61, no. 4 (July 2023): 970–87. <https://doi.org/10.1111/jcms.13440>.

3

Ukraine as Reality Check? Ambitions of Autonomy before and after February 2022

The post-Lisbon setup of the CSDP and the objectives set forth in the EUGS were abruptly challenged when Russia launched its full-fledged invasion of Ukraine on 24 February 2022 and escalated a frozen conflict to a large-scale war right on the EU's eastern doorstep. The constant Russian threats to EU member states in the east of Europe (particularly Poland and the Baltics) further impacted the EU's strategic environment. While the EU responded swiftly by sanctioning Russia on financial markets, the defence policy response was much slower, as it required both the coordination and organisation of contributions from all 27 member states. Although the EU rhetoric quickly acknowledged the new realities created by the Russian invasion of Ukraine and has provoked considerable reactions in terms of assistance measures, NATO has resurged as the primary security and defence actor in Europe.

In this context, the EU faced both an opportunity and a major challenge in its endeavour to strengthen its position as a security actor. Starting with the release of the Strategic Compass in March 2022, multiple defence-related measures emerged, such as acts on ammunition production and the defence industry more generally, or they were expanded in the budget (e.g., the EPF). Altogether, the CSDP received increased attention within EU institutions and member states alike. Driven by a determination to strengthen its political position in security and defence, the EU launched initiatives to increase its industrial capabilities, foster cooperation, and, foremost, deliver support to Ukraine. However, many

of these initiatives were grounded in the existing framework of institutions and strategies that the war further legitimised. This section thus examines how the war in Ukraine has impacted the programmes and infrastructures that had already been in place before February 2022 and how the EU has adapted its strategic approach. The Russian invasion of Ukraine can be seen as a ‘reality check’ for the CSDP and the EU position as a security actor in Europe. It has displayed in multiple ways how the EU acts in security and defence while also casting light on problems and challenges facing EU security and defence policy.

3.1. The Strategic Compass and Renewed Focus on Defence and Capability Development

Published in March 2022, the release of the Strategic Compass (SC) coincided with the Russian invasion of Ukraine. While often regarded as the first EU reaction to the full-scale Russian invasion, the drafting process had already commenced under the German Council Presidency in 2020 in order to shore up the security and defence dimension of the EUGS. As the document was drafted mainly in the 2020-21 timespan, substantial adaptations were necessary in the weeks before its implementation; particularly in terms of how to address Russia, but also in the assessment of other threats, especially in the military dimension. In this reaction, the SC set forth concrete action items to strengthen security and defence in reaction to the Russian aggression.⁷² Consequently, it is regarded as more concrete than the rather broad and more globally oriented EUGS objectives. The major difference to the EUGS lies in providing detailed points of action, particularly in the field of defence, prompting a perception of the SC as the ‘first-ever defence strategy’⁷³ of the EU. Moreover, the SC reflects the developments in the CSDP after the Global Strategy, and while it does not claim to replace the EUGS, the Strategic Compass does visibly shift priorities, as this section shows.

With the EUGS setting forth a broad agenda for the CSDP, drafting the SC was seen to ‘serve as a useful mechanism to enhance and guide

72. Interview 8.

73. Fiott, “In Every Crisis an Opportunity?”

the implementation of the level of ambition agreed upon in the EUGS.⁷⁴ Through the Strategic Compass, the EU thus attempted to complement the EUGS, particularly in the dimension of security and defence.⁷⁵ And in so doing, HRVP Josep Borrell attempted to guide the process of drafting the SC in terms of concrete proposals to implement the objectives set forth in the EUGS. This comprised strengthening infrastructures that emerged from the Global Strategy, such as the Permanent Structured Cooperation (PESCO), which was deemed necessary, since the EUGS has initiated multiple processes and initiatives, albeit while lacking a comprehensive security and defence framework within which these initiatives would function.

The drafting of the SC was approached differently than the EUGS. One major change was that the EEAS, with the information from member states and the EU Intelligence Centre (INTCEN), conducted a threat analysis to assess the strategic picture for the EU's wider security.⁷⁶ While this drafting and negotiation process was almost finished by February 2022, there was a widespread sense after the onset of the Russian invasion that the document required adaptations to constitute a proper reaction to the Russian aggression.⁷⁷ This was reflected in the language towards Russia and China, which addressed them as clear threats to EU security and set forth a – by EU standards – tough stance on these nations. Moreover, described in terms of a 'tectonic shift' and the 'return of power politics',⁷⁸ the Russo-Ukrainian War fostered the proposals set forth in the SC by heightening the sense of urgency that the EU must become a stronger security and defence actor. As the table shows, how-

74. Dick Zandee, Adája Stoetman, and Bob Deen, "The EU's Strategic Compass for Security and Defence: Squaring Ambition with Reality," Clingendael Report (The Hague: Clingendael, 2021), 13, https://www.clingendael.org/sites/default/files/2021-05/Report_The_EUs_Compass_for_security_and_defence_May_2021.pdf.

75. Markus Kaim and Ronja Kempin, "Compass or Wind Chime? An Analysis of the Draft 'Strategic Compass' of the EU," SWP Comment (Berlin: Stiftung Wissenschaft und Politik, 2022), https://www.swp-berlin.org/publications/products/comments/2022C03_Strategic-Compass.pdf.

76. Interview 8.

77. Steven Blockmans, Dylan Macchiarini Crosson, and Zachary Paikin, "The EU's Strategic Compass: A Guide to Reverse Strategic Shrinkage?," CEPS Policy Insights (Brussels: Center for European Policy Studies, 2022), https://www.ceps.eu/download/publication/?id=36032&pdf=CEPS-PI2022-14_EU-Strategic-Compass.pdf.

78. European Union, "A Strategic Compass for Security and Defence".

ever, the mode of security and defence promoted in the SC does not emerge solely as a reaction to the Russian invasion of Ukraine; rather, it promotes a more pre-emptive and preventive approach focusing on issues such as preparedness, resilience, and capabilities.⁷⁹

The Strategic Compass sets forth four strands of work that are seen as crucial in the further development of the CSDP. Altogether, the SC set forth much more tangible objectives in comparison to the EUGS, with 81 concrete policy objectives, which are likely to be the measuring sticks if the SC can be deemed a successful strategy.⁸⁰ The first annual implementation report in 2023 made vague claims that the EU is ‘narrowing the gap between our aspirations and our actions’. While highlighting a few successful initiatives, such as the setup of a Joint Defence Procurement Taskforce, it is still too early to make any sort of assessment in this regard. Rather, it remains to be seen whether the SC has really engendered a wider change in the EU’s strategic culture or if it perpetuates the current political discourse of formulating a wide array of objectives without fully realising them.⁸¹

79. Marieke De Goede, Stephanie Simon, and Marijn Hooijink, “Performing Preemption,” *Security Dialogue* 45, no. 5 (October 1, 2014): 411–22, <https://doi.org/10.1177/0967010614543585>.

80. Sebastian Clapp, *Implementation of the Strategic Compass: Opportunities, Challenges and Timelines*. (Brussels: European Parliamentary Research Service, 2022), <https://data.europa.eu/doi/10.2861/888903>.

81. Kaim and Kempin, “Compass or Wind Chime? An Analysis of the Draft ‘Strategic Compass’ of the EU.”

Table 2: Four Strands of Work within the Strategic Compass⁸²

ACT	Under the notion of 'Act', the Strategic Compass specifically focuses on the missions within the CSDP framework and on the EU's capacity to react to crises in its neighbourhood. As the SC articulates, one of the major instruments to achieve 'more rapidity, robustness and flexibility', is the EU Rapid Deployment Capacity , which should modify the preceding EU Battlegroups into a flexibly deployable force of 5,000 troops. This is in line with the endeavour to strengthen preparedness and improve the functionalities of the CSDP missions, both in the military and civilian domains. The chapter can be understood as an attempt at strengthening the EU's capabilities to act globally, but also to improve planning and increase the availability of military personnel more broadly. It thus is aimed to underpin the EU's endeavours to position itself as a credible, global security actor.
SECURE	The notion of 'Secure' puts the notion of 'resilience' at centre and lays out a large set of 'hybrid' threats; for example, in terms of cyberdefence. To this end, the SC proposes the development of the EU Hybrid Toolbox that comprises a set of vaguely defined measures. Moreover, through structural changes, the SC proposes strengthening both EU Intelligence and Space capabilities, for example, through the Single Intelligence Analysis Capacity or expanding the EU Satellite Centre. Moreover, the chapter includes climate change as relevant for defence matters, as exemplified by the reiteration of the Climate Change and Defence roadmap.
INVEST	The chapter entitled 'Invest' mainly pertains to the wider rationality of capability development by defining 'mitigating strategic dependences' and capability development as the central objectives. To this end, instruments such as PESCO, the EDF, and the European Defence Innovation Hub are presented and reified as solutions. Furthermore, the chapter unveils two central ongoing trends in the CSDP. First, it envisions member state defence spending also increasing, a trend that was already observable before 2021. ⁸³ Second, it highlights the aspect of developing the European defence industry by funding Research and Development (R&D); for example, through initiatives such as the European Defence Technological and Industrial Base (EDTIB). Thus, the chapter promotes the EU's role as a security actor mostly through capability development.
PARTNER	The final chapter, 'Partner', is the most globally oriented section of the SC and describes partnering with third countries as vital for EU security. Partnerships should on the one hand provide security within the EU; for example, through a close connection to and cooperation with NATO, which is described as vital for EU security. On the other hand, they should promote the role of the EU as a global security actor through regional and bilateral cooperation (e.g., with regional institutions such as ASEAN and the African Union) or with nation-states in specific regions (e.g., the Western Balkans, the MENA-region, or Latin America).

82. European Union, "A Strategic Compass for Security and Defence."

83. European Defence Agency, Defence Data Portal: <https://eda.europa.eu/publications-and-data/defence-data>.

3.2. Making the EU Autonomous: Developing Capabilities for a ‘Europe that Protects’

3.2.1. ‘Autonomy’ as a Controversial Security and Defence Rationale

In his 2016 speech on the state of the EU, former Commission President Juncker spoke of a ‘Europe that protects, empowers and defends’,⁸⁴ pertaining to the necessity to increase EU defence capabilities. At the same time, the EUGS framed and presented these endeavours as part of the ‘strategic autonomy’ doctrine, which has since evolved into a broader (albeit controversial) concept.⁸⁵ The scope of what ‘strategic autonomy’ encompasses is contested, and definitions are widespread and heterogeneous among analysts.⁸⁶ Within EU institutions, the definition of the concept is described as essentially a second-order issue, whereas the focus should be more on the actions serving to implement and help the EU to become more autonomous.⁸⁷ This underlines the nature of the debate on autonomy more broadly; while the definition thereof is of little significance, it nevertheless serves as a logic that shapes security and defence in the EU more broadly.

Historically, the concept of (strategic) autonomy was often reformulated and abandoned; for example, the Saint-Malo Declaration between France and the UK in 1998 could be seen as a precursor for the concept.⁸⁸ Autonomy gained traction, as pointed out earlier, through the

84. Jean-Claude Juncker, “State of the Union Address 2016: Towards a Better Europe – a Europe That Protects, Empowers and Defends,” 2016, https://ec.europa.eu/commission/presscorner/detail/en/SPEECH_16_3043.

85. Cristiano Cagnin et al., *Shaping and Securing the EU’s Open Strategic Autonomy by 2040 and Beyond* (Luxembourg: Publications Office of the European Union, 2021).

86. E.g., as “*the ability to set one’s own priorities and make one’s own decisions in matters of foreign policy and security, together with the institutional, political and material wherewithal to carry these through*” by Barbara Lippert, Nicolai von Ondarza, and Volker Perthes, “European Strategic Autonomy: Actors, Issues, Conflicts of Interests,” SWP Research Paper (Berlin: Stiftung Wissenschaft und Politik, 2019); or “*the ability of Europe to make its own decisions, and to have the necessary means, capacity and capabilities available to act upon these decisions, in such a manner that it is able to properly function on its own when needed.*” by Zandee et al., “The EU’s Strategic Compass for Security and Defence. Squaring Ambition with Reality.”

87. Interview 8.

88. Giedrius Česnakas, “European Strategic Autonomy: The Origins Story,” in *European Strategic Autonomy and Small States’ Security*, by Giedrius Česnakas and Justinas Juozaitis, 1st ed. (London: Routledge, 2022), 14–33, <https://doi.org/10.4324/9781003324867-2>.

attempts at establishing the EU as a global actor in the EUGS. While the strategy did not provide any definition of 'strategic autonomy', it set forth the necessity of achieving it and outlined central elements, such as the build-up of a strong defence industry.⁸⁹ Since the EUGS, strategic autonomy has expanded from a purely foreign and security-related concept to a wide array of fields, such as energy, medical supply, or incorporated discussions on other elements, such as digital or technological sovereignty.⁹⁰ In security and defence, however, the concept is rarely used in official documents, such as the SC, due to its controversial nature, signifying something of a conceptual retreat in these fields. However, autonomy remains an underlying logic of numerous policy proposals and political programmes, such as strengthening EDTIB and funding defence research and innovation through the EDF. Thus, 'strategic autonomy' itself is a contentious concept that is embraced by some member states and parts of institutions while simultaneously refuted by others.⁹¹ Speaking about autonomy more broadly, however, pertains strongly to the ability of the EU to provide security and thus permeates political initiatives to this end.

Autonomy can thus be understood as a dominant logic through which the EU seeks to establish its role as a security actor. While the polysemous nature of the concept renders 'measuring' whether autonomy is achieved nearly impossible, the notion justifies more expansive measures in security and defence. Understandings of autonomy are highly fluid but essentially describe the strengthening of European production and the supply of crucial goods as a central factor in the capacity of the EU to act.⁹² For security and defence, it thus provides an important rationale through which the EU can position itself as a security provider. This materialises in specific political actions, such as the setup of funding

89. European Union, "Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign And Security Policy," 46.

90. Rocco Bellanova, Helena Carrapico, and Denis Duez, "Digital/Sovereignty and European Security Integration: An Introduction," *European Security* 31, no. 3 (July 3, 2022): 337–55, <https://doi.org/10.1080/09662839.2022.2101887>; Timo Seidl and Luuk Schmitz, "Moving on to Not Fall behind? Technological Sovereignty and the 'Geo-Dirigiste' Turn in EU Industrial Policy," *Journal of European Public Policy*, August 24, 2023, 1–28, <https://doi.org/10.1080/13501763.2023.2248204>.

91. Česnakas, "European Strategic Autonomy. The Origins Story."

92. Cagnin et al., *Shaping and Securing the EU's Open Strategic Autonomy by 2040 and Beyond*.

schemes and cooperation infrastructures as well as the expansion of industrial capabilities.

The Russian invasion of Ukraine has fuelled debates about the EU being an autonomous security actor, particularly in the context of the ongoing support of Ukraine. A few weeks after the onset of the war, the respective heads of state or heads of government of the 27 member states issued the ‘Versailles Declaration,’⁹³ in which they reiterated the necessity of bolstering defence capabilities and the ability of the EU to act autonomously in security and defence matters. This notion was repeated numerous times over months by different actors, reaching from the President of the Commission over the HRVP Josep Borrell to French President Emmanuel Macron, who in spring 2023 stated that Europe must become more independent of the US in its capability to act as a security and defence provider, both within the continent and globally.⁹⁴ Moreover, with the partnership with the United States becoming unpredictable due to the domestic political situation in the US and the possible re-election of Donald Trump in 2024, the EU is described as feeling a pressure to become more autonomous, at the same time it is being criticised for not treating this scenario with sufficient urgency.⁹⁵ More broadly speaking, autonomy has thus gained significance in terms of the EU’s (self-)perception as security actor, particularly against the backdrop of possible receding transatlantic relationships.

Tracing how autonomy is achieved on a material level is difficult, both in analytical terms as well as for policy-makers. Particularly the debate around the concept of ‘Strategic Autonomy’ makes vivid the challenges of becoming an ‘autonomous’ security actor. It highlights the tension between the more overt articulation of autonomy and the underlying processes thereof. On the one hand, the EU seems to shy away from focussing on the concept on a semantic level. This becomes obvious

93. European Council, “Informal Meeting of the Heads of State or Government: Versailles Declaration,” 2022, <https://www.consilium.europa.eu/media/54773/20220311-versailles-declaration-en.pdf>.

94. Europe must resist pressure to become ‘America’s followers,’ says Macron, <https://www.politico.eu/article/emmanuel-macron-china-america-pressure-interview/>; April 9, 2023.

95. Nicolai von Ondarza and Marco Overhaus, “Rethinking Strategic Sovereignty Narratives and Priorities for Europe after Russia’s Attack on Ukraine,” SWP Comment (Berlin: Stiftung Wissenschaft und Politik, 2022), https://www.swp-berlin.org/publications/products/comments/2022C31_Strategic_Sovereignty.pdf, also Interview 8.

in the Strategic Compass, where the concept is only mentioned once, briefly and superficially. Indeed, EU officials seem to reject the notion as such, as they feel the conceptual debate about what strategic autonomy and technological sovereignty mean are hindering the actual implementation of necessary instruments to achieve the goal of becoming a security provider.⁹⁶ On the other hand, political objectives that work towards stronger EU autonomy, such as the build-up of European defence capabilities, remain a key element in the strategic direction. This underpins how autonomy is a highly controversial but influential notion, and there are multiple understandings of what EU institutions and member states mean by it. The conceptual debates notwithstanding, the sets of action to achieve autonomy are argued to be much more straightforward. As one EU official pointed out, political programmes to this end should basically lie in the fields of action proposed in the SC.⁹⁷ This shows how the efforts to become more autonomous serve as a more underlying logic of the EU's security and defence policy.

Autonomy, while a highly contentious topic, should therefore be understood more as an 'enabler' or 'logic' of certain political proposals, such as the development of capabilities, technologies and the defence industry,⁹⁸ and less as a fully defined political objective. Therefore, it makes sense to analyse how the logic of autonomy has fuelled more concrete policy proposals and political actions on the EU level and thus understand it as shaping goals rather than an objective itself. This also displays the concept's polysemy depending on spatial and temporal differences; for example, the EUGS conceptualised autonomy differently than the SC, and R&D programmes interpret the concept in different ways than is typically the case in industrial development. Moreover, autonomy is not reduced to the EU level, but is also aiming to support national militaries and industries through funding mechanisms. The analysis will therefore be oriented along actions that are implemented on the EU level but are beneficial for capability development processes and enabling military capacities for national militaries and EU institutions alike. The next section will show how the EU's endeavour of autonomy has prolif-

96. Interviews 7, 8, 9, 11.

97. Interview 8.

98. Csernaton, "The EU's Hegemonic Imaginaries."

erated a number of concrete policy programmes that also permanently shape and redefine what strategic autonomy means and encompasses particularly in terms of capability development, as those are the most tangible results of the rationality of autonomy.

3.2.2. What Are the EU's Tools to Follow the Autonomy Endeavour?

One objective that is often formulated as indispensable to strengthening the role of the EU as a security actor is the development and provision of its own capabilities;⁹⁹ in other words, becoming independent of external capability providers, such as the United States. Long-standing issues in terms of capability development (e.g., inadequate industrial capacity, absence of clear strategic planning) become issues, rendering not only developing but also capability planning a central element of autonomy as a policy goal.¹⁰⁰ To this end, the EU has institutionalised political schemes and flagship infrastructures to improve capability development, such as the Permanent Structured Cooperation (PESCO), the Coordinated Annual Review on Defence (CARD), and the European Defence Fund (EDF). The exact goals of these programmes are based on objectives set as part of the Capability Development Plan (CDP), which set out 11 priorities (see Figure 2). Through the CDP (which is mainly coordinated by EDA in cooperation with member states), the EU Military Command (EUMC), and the EU Military Staff (EUMS), attempt is made to create a streamlined, coherent picture of the EU-level capability gaps and needs.¹⁰¹ The CDP is also subject to constant review,¹⁰² the latest having been concluded in November 2023 and resulting in 22 new priorities for the CDP.¹⁰³ The CDP thus serves as an instrument through which autonomy is reflected in planning, which attempts to render the conditions for strategic autonomy more vivid and attainable.

99. Cagnin et al., *Shaping and Securing the EU's Open Strategic Autonomy by 2040 and Beyond*.

100. Interviews 7, 8.

101. European Defence Agency, "The EU Capability Development Priorities"; European Defence Agency, *Enhancing EU Military Capabilities beyond 2040: Main Findings from the 2023 Long Term Assessment of the Capability Development Plan*. (LU: Publications Office, 2023), <https://data.europa.eu/doi/10.2836/360180>.

102. Interview 7.

103. European Defence Agency, "The 2023 EU Capability Development Priorities" (Brussels, 2023), <https://eda.europa.eu/docs/default-source/brochures/qu-03-23-421-en-n-web.pdf>.

Figure 2: The 2023 EU Capability Development Priorities¹⁰⁴



Most initiatives (e.g., PESCO, EDF, CARD) have been initiated through the Global Strategy. However, it was in the drastically changed security environment in the aftermath of the Russian invasion of Ukraine that the work programmes and priority setting in these structures has been aligned more strongly to capability objectives, creating a sense of urgency within these structures. Moreover, new initiatives have been implemented since February 2022, most notably the Act in Support

104. European Defence Agency.

of Ammunition Production (ASAP, see Textbox 2), as well as the European Defence Industry Reinforcement through Common Procurement Act (EDIRPA). Both aim at strengthening defence industry capacities, which have often been described as lacking.¹⁰⁵ As this section shows below, industrial development is a wider aim in the context of strategic autonomy, and it comprises a major area of work, both for the Commission and EDA.

Textbox 2: The Act in Support of Ammunition Production

In July 2023, the EU adopted the Act in Support of Ammunition Production (ASAP) following multiple calls by the Council and Commission to ramp up ammunition capabilities and replenish stocks – for member states but specifically also to support Ukraine. ASAP provides €500 mil (DKK 3,75 bn) to increase both production capacities as well as strengthen supply chains and ammunition procurement.¹⁰⁶ Here, ASAP is part of a larger initiative to increase the supply of ammunition, which is also partly funded through the European Peace Facility.¹⁰⁷ ASAP should enable industries to be able to overcome gaps in production capacity and to fulfil ammunition supply needs.¹⁰⁸ This policy thus provides a vivid example of how EU production and procurement capabilities have been reinforced in response to the war in Ukraine.

Looking at autonomy thus means to examine the EU's already established capability development structures and how they are guided by the logics of strategic autonomy. To this end, two main strains of initiatives are presented more closely; namely, PESCO and military cooperation as well as the EDF and efforts to strengthen the European Defence Technological and Industrial Base (EDTIB). These initiatives cover three important capability development domains – defence cooperation, Re-

105. Interview 8.

106. European Union, "Regulation (EU) 2023/1525 of the European Parliament and of the Council of 20 July 2023 on Supporting Ammunition Production (ASAP)," 2023, <https://eur-lex.europa.eu/eli/reg/2023/1525/oj>.

107. Interviews 3, 8.

108. Interview 6.

search and Innovation (R&I), and industrial policy – that are deemed important in the Strategic Compass chapter regarding 'Invest'. Moreover, as the 2022 CARD describes, 'these initiatives have not reached their full potential',¹⁰⁹ rendering the interrogation of their specific challenges in understanding the obstacles on the road to strategic autonomy.

Permanent Structured Cooperation (PESCO):

The Permanent Structured Cooperation (PESCO) is a long-standing project that first emerged with the Treaty of Lisbon; however, it was not fully realised until its implementation in 2017, fostered through the momentum of the Global Strategy.¹¹⁰ Upon PESCO's adoption, former Commission President Jean-Claude Juncker thus tweeted: 'She is awake, the Sleeping Beauty of the Lisbon Treaty', signifying the realisation of what was seen as a potential EU security and defence initiative for an extended time.¹¹¹ The purpose of PESCO is to foster cooperation between the defence forces of member states in terms of capability development and to support CSDP missions.¹¹² However, the specific nature of the initiative being based on the Lisbon Treaty makes the member state commitments to cooperation legally binding, which is envisioned to bring more sustainable solutions.¹¹³

PESCO thus works mainly through the member states while being governed by the PESCO secretariat, which consists of members of EEAS, EDA, and the EUMS. The programme works in a project-based manner, where different military institutions within member states collaborate to produce a capability that can be used ideally both by national militaries and in support of CSDP operations. These projects therefore do not

109. European Defence Agency, "The 2022 Coordinated Annual Review on Defence Report" (Brussels, 2022), <https://eda.europa.eu/docs/default-source/eda-publications/2022-card-report.pdf>.

110. Council of the European Union, "Implementation Plan on Security and Defence," 2016, <https://www.consilium.europa.eu/media/22460/eugs-implementation-plan-st14392en16.pdf>.

111. Tania Latici and Eleni Lazarou, "PESCO: Ahead of the Strategic Review," Briefing (European Parliamentary Research Service, 2020), [https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI\(2020\)652051_](https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2020)652051_), Interview PESCO0410

112. European Union, "Council Decision (CFSP) 2017/2315 of 11 December 2017 Establishing Permanent Structured Cooperation (PESCO) and Determining the List of Participating Member States," 2017, <https://eur-lex.europa.eu/eli/dec/2017/2315/oj>.

113. Interview 9.

only comprise concrete technological devices, but military capabilities more broadly, as projects on military mobility, cyber response teams, and the European Medical Command show, which are also projects deemed successful first examples of how PESCO cooperation works. PESCO is a clear case of a pre-existing structure that has come under pressure since the Russian invasion of Ukraine through a heightened ‘sense of urgency.’¹¹⁴ While interest in capability development has emerged from member states and made PESCO a more viable mechanism, the long-term nature of projects hinders their operationalisation, as requirements are formulated more urgently. Although this raises challenges for the programme, its binding commitments will result in its continuation, as it is regarded as one of the cornerstones of EU capability development;¹¹⁵ nevertheless, whether PESCO can fulfil its envisioned role against the backdrop of a changing security environment remains to be seen.

The European Defence Fund (EDF) and the European Defence Technological and Industrial Base (EDTIB):

Although the European Defence Fund (EDF) is an even younger infrastructure than PESCO, having been established in 2021, it was preceded by different programmes to foster R&I in the defence realm, including the Preparatory Action for Defence Research (PADR), the European Defence Industrial Development Programme (EDIDP), and a Group of Personalities on Defence Research. In that sense, the making of the EDF resembled the civil Security Research Programme (SRP) in the Horizon programmes,¹¹⁶ with which the EDF also shares commonalities in terms of project-handling and agenda-setting. While similar in nature, however, the EDF budget exceeds that of the SRP in Horizon Europe during the Multiannual Financial Framework (MFF) from 2021-27 by a large margin (the EDF has a roughly €8 bn budget, whereas the SRP budget is around €1.6 bn).¹¹⁷ In the case of the EDF, it was argued that the cre-

114. Ibid.

115. Sven Biscop, “European Defence: Give PESCO a Chance,” *Survival* 60, no. 3 (May 4, 2018): 161–80, <https://doi.org/10.1080/00396338.2018.1470771>.

116. Calle Håkansson, “The European Commission’s New Role in EU Security and Defence Cooperation: The Case of the European Defence Fund,” *European Security* 30, no. 4 (2021): 595, <https://doi.org/10.1080/09662839.2021.1906229>.

117. European Commission, *Horizon Europe Strategic Plan 2021-2024* (Brussels: Publications Office of the European Union, 2021).

ation of a defence innovation ecosystem required substantial funding.¹¹⁸ However, this also demonstrates the increased significance that defence has assumed in the EU more broadly.

Overseen by the Commissions Directorate General for Defence Industry and Space (DG DEFIS), the EDF works by setting up research calls upon which consortia consisting of military forces, research institutions, and industrial actors form and work on specific projects. Compared to PESCO, EDF projects and work programmes focus more on technological research and development. In a couple of instances, however, R&I is described as an important element in achieving autonomy. First, as one official put it, 'for the Union to be able to defend itself, it must also have state-of-the-art technologies. We can't stay behind other countries.'¹¹⁹ This echoes sentiments from the civil sector, where a 2021 Commission document states that R&I 'plays a key role in addressing the current security challenges and is already helping us in finding solutions to several of the most pressing issues.'¹²⁰ To this end, the EDF research calls are strongly oriented towards the CDP, rendering the EU capability objectives a driving force to increase the applicability of EDF projects. The EDF also draws connections to PESCO by providing partial funding to PESCO projects, which implements R&I logics in military capability projects.

Moreover, the EDF is perceived as 'also helping to defragmentise the market and to support the competitiveness and innovativeness of the European defence industry.'¹²¹ Emerging from EDIDP and having industry strongly involved in the PADR thus shaped the EDF as an important tool in increasing the European Defence Technological and Industrial Base (EDTIB). While the EDF's impact is difficult to assess due to its recent implementation, it is nevertheless an important tool to strengthen both research and industrial capabilities. The EDF is also expected to reflect the security situation after the Russian invasion of Ukraine more

118. Interview 11.

119. Ibid.

120. European Commission, "Commission Staff Working Document: Enhancing Security through Research and Innovation," 2021, https://home-affairs.ec.europa.eu/news/enhancing-security-through-research-and-innovation-2021-12-15_en.

121. Interview 11.

strongly in terms of changing capability needs.¹²² However, the connection to the EDF also unveils a central tension in the development of research-based industrial capabilities: While industrial capabilities must be ready in the short-term, long-term innovative technologies must also be developed to anticipate possible future challenges. This temporal dimension thus poses a challenge in terms of priorities and strategic direction at the interface of R&I and industrial development.

The EDF is, thus, part of a wider set of policies working towards strengthening the EDTIB. With the EDF based on DG DEFIS, it is part of the wider defence industrial policy that has gained increased interest; not only since February 2022, but through broader endeavours to strengthen the defence-industrial base and security industry synergies.¹²³ However, the onset of the Russo-Ukrainian War has underscored the perception of defence industry deficiencies that leave the EU more vulnerable. Consequently, industrial capabilities have seen increased attention.¹²⁴ To this end, DG DEFIS and EDA have both initiated different programmes that include the EDF prominently, but not exclusively. EDA encourages cooperation and seeks to highlight the industrial dimension – also in member state initiatives.¹²⁵ From the Commission's side, next to the EDF, the European Defence Industry Reinforcement through Common Procurement Act (EDIRPA), which was implemented in October 2023, signifies an important endeavour in the build-up of defence industrial capabilities.

The Commission's endeavours in the build-up of the EU defence industry culminated in the first-ever European Defence Industrial Strategy (EDIS), released in March 2024, which highlights how insufficient defence industrial capacities are perceived as a more substantial problem for the Union's role as a security actor and provider, particularly against the backdrop of the war in Ukraine.¹²⁶ The strategy thus promotes politi-

122. *Ibid.*

123. European Commission, "Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: Action Plan on Synergies between Civil, Defence and Space Industries," 2021.

124. Interview 7.

125. *Ibid.*

126. European Commission, "Joint Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A New European Defence Industrial Strategy: Achieving EU Readiness

cal action in terms of strengthening both manufacturing capabilities and encouraging common procurement from member states to avoid fragmentation and to spend more effectively.¹²⁷ Thus, it enables something that was mostly unimaginable before the Russian full-scale invasion of Ukraine: joint procurement of military capabilities, technologies, and (under ASAP) ammunition.¹²⁸ Nevertheless, critical tensions remain in terms of the strategic direction and temporal dimension.

3.3. An 'Autonomous' EU as Security Provider?

Autonomy has become an underlying and central tenet in EU security and defence policy. While the Russian invasion of Ukraine has been seen as a 'very real wake-up call'¹²⁹ for increasing defence capability investment, the imaginary of the EU as an autonomous security actor has underpinned security and defence efforts since the CSDP. This materialised in initiatives such as PESCO, EDF, EDIRPA, and ASAP, and it will likely translate into stronger future endeavours, such as the full-fledged strategy for the defence industry (EDIS). Autonomy thus represents a governing and policy-making rationale in security and defence that engenders infrastructures and mechanisms towards strengthening the overall EU military capabilities. While the notion of autonomy refers more to the perception of the EU as a full-fledged security actor (which especially the European Commission seeks to achieve), the effects are visible in capability development processes.

Autonomy nevertheless remains a contentious topic, not least as demonstrated by the 'strategic autonomy' debates. While there is agreement that the EU and its member states have failed to invest in defence capabilities sufficiently, commentators have dismissed the possibility of

through a Responsive and Resilient European Defence Industry," 2024, https://defence-industry-space.ec.europa.eu/document/download/3b4ec5fb-395c-49ea-abf2-fb54ca6dfd6c_en?filename=EDIS%20Joint%20Communication_0.pdf.

127. European Union, "Regulation (EU) 2023/2418 of the European Parliament and of the Council of 18 October 2023 on Establishing an Instrument for the Reinforcement of the European Defence Industry through Common Procurement (EDIRPA)," 2023, https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:L_202302418.

128. Interview 8.

129. Interview 4.

the EU achieving autonomy, particularly from the US, and should possibly move in a different direction.¹³⁰ Moreover, with emerging debates regarding the role of the United States in Europe and the possibility of a retreat, autonomy is regarded as a response to a threat, despite being argued to remain an illusion for now.¹³¹ As Chapter 5 will outline, member states have assumed different positions on autonomy; while some (e.g., France) are strongly pursuing it, others are either much more hesitant or regard it as a threat to the transatlantic relationship.¹³² These controversies notwithstanding, the debate shows how autonomy represents a reality in the political discussions of most member states, also because the programmes directed towards autonomy (e.g., PESCO, EDF) are seen as mostly beneficial to member states.

While the idea of autonomy has shaped programmes for capability development and therefore had material impact on EU security and defence policy, it remains a contentious issue. Capability development programmes that have worked towards achieving increased independence from other states by expanding industrial capabilities and fostering cooperative efforts have been established before the Russian invasion of Ukraine, signifying how autonomy has represented an ongoing, underlying element in security and defence. The war in Ukraine has accelerat-

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130. Matthew Karnitschnig, "America's European Burden: How the Continent Still Leans on the US for Security," *Politico Europe*, 2023, <https://www.politico.eu/article/america-europe-burden-continent-leans-security-defense-military-industry/>; Laura Kayali, Lili Bayer, and Posaner, "Europe's Military Buildup: More Talk than Action," *Politico Europe*, 2023, <https://www.politico.eu/article/europe-military-industry-defense-buildup-war/>; "Onwards and Outwards: Why the EU Needs to Move from Strategic Autonomy to Strategic Interdependence," *ECFR Commentary* (blog), 2023, <https://ecfr.eu/article/onwards-and-outwards-why-the-eu-needs-to-move-from-strategic-autonomy-to-strategic-interdependence/>.
 131. Hugo Meijer and Stephen G. Brooks, "Illusions of Autonomy: Why Europe Cannot Provide for Its Security If the United States Pulls Back," *International Security* 45, no. 4 (April 20, 2021): 7–43.
 132. Andris Banka, "Germany: The Renewed Quest for Strategic Autonomy," in *European Strategic Autonomy and Small States' Security*, by Giedrius Česnakas and Justinas Juozaitis, 1st ed. (London: Routledge, 2022), 51–62, <https://doi.org/10.4324/9781003324867-2>; Ieva Gajauskaitė, "Poland's Resilient Atlanticism," in *European Strategic Autonomy and Small States' Security*, by Giedrius Česnakas and Justinas Juozaitis, 1st ed. (London: Routledge, 2022), 63–79, <https://doi.org/10.4324/9781003324867-2>; Ringaile Kuokšytė, "Revisiting France's Commitment to Defence Integration," in *European Strategic Autonomy and Small States' Security*, by Giedrius Česnakas and Justinas Juozaitis, 1st ed. (London: Routledge, 2022), 35–50, <https://doi.org/10.4324/9781003324867-2>; Theussen, "European Strategic Autonomy: Opportunities and Threats for Denmark."

ed these efforts, as the necessity to support Ukraine while building up defence capabilities challenged the EU capability development efforts. Autonomy has therefore become a central security and defence logic despite the concept itself remaining highly controversial. However, the extent to which EU efforts can contribute to the imaginary of an 'autonomous' Europe in security and defence remains unclear. It remains an important tool to understand the emergence of specific policy programmes; whether it is an attainable objective is a more controversial and complex issue.

4

Global or Regional? The EU's Role as Security Actor and Provider

When Ursula von der Leyen assumed office as President of the European Commission in 2019, she formulated the Geopolitical Commission as an objective,¹³³ in which the global position of the EU is articulated through the CFSP as well as the wider work of the Commission. In so doing, the von der Leyen Commission underlined its intent to develop the EU into a full-fledged global actor already before the onset of the war in Ukraine. In this context, autonomy has been regarded as an important aspect of capability development, but it also ties to questions of enabling the EU as an 'actor' in security and defence and its agency in shaping the continent's defence policy.¹³⁴ Increasing the perception of the EU as an (autonomous) actor in security and defence thus also connects to capacities of global and regional action and EU actions in both the civilian and military realms. While actions such as CSDP missions have been ongoing since 2003,¹³⁵ the Russian invasion of Ukraine has spurred actions and interventions aimed at an increasing role of the EU in creating capacities as well as the credibility of a more global EU role. This also holds implications for the coherence of action among member states, as the EU must arguably speak with one voice and at the same

133. Haroche, "A 'Geopolitical Commission'?"

134. Mälksoo, "From the ESS to the EU Global Strategy."

135. Howorth, "The EU's Security and Defence Policy: A New Leap Forward?"

time be quicker in its decision making.¹³⁶ At the same time, also by virtue of the institutional opportunities created through the Lisbon Treaty, the Commission has taken a stronger role in security and defence, which also speaks to its orientation towards a 'Geopolitical Commission'.¹³⁷ This section will analyse the CFSP and CSDP instruments working towards establishing the EU as a global security 'power' and how this affects perceptions of the EU as a security provider within Europe, especially against the backdrop of the ongoing war in Ukraine and the fluid security environment.

4.1. Arming Ukraine: The Emergent Significance of the European Peace Facility

Often criticised for its inability to make decisions and act quickly, the EU reaction in the aftermath of 24 February 2022 was perceived as surprisingly prompt and decisive, both in terms of widespread agreement to sanctions packages and the provision of support to Ukraine.¹³⁸ While sanctions were mostly a matter of intergovernmental cooperation and the member states followed the proposals made by the Commission, in terms of support, the EU could rely on an already established mechanism: the European Peace Facility (EPF). The EPF was established in 2021 as an amalgam of previously existing mechanisms; mainly the Athena mechanism, which was used to fund military CSDP missions, and the African Peace Facility, which was used to fund peacebuilding and -keeping measures in Africa in collaboration with the African Union (AU).¹³⁹ As an off-budget¹⁴⁰ Foreign Policy Instrument (FPI), the EPF combined these programmes as two pillars in its regulations – the Ops-pillar and Assistance Measures-pillar – where the former continues to fund CSDP operations and the latter is to support 'military aspects of

136. Interviews 1, 2, 4.

137. Håkansson, "The Ukraine War and the Emergence of the European Commission as a Geopolitical Actor."

138. Interview 4.

139. Interview 3.

140. Off-Budget means that the EPF is outside of the Multiannual Financial Framework and funded through additional contributions by member states, relative to their size.

peace support operations led by a regional or international organisation or by third States'.¹⁴¹ While this notion moved away from one specific region, in the early stages of the EPF it was still seen as an instrument mainly devoted to measures in Africa.¹⁴²

The full-scale Russian invasion of Ukraine in February 2022 drastically changed the significance and role of the EPF, and it emerged as one of the central instruments in the EU reaction to the Russian aggression. This already becomes visible in the budget, which has more than doubled from the initial €5.6 bn to €12 bn in autumn 2023.¹⁴³ In this time, more than €3.6 bn went to military support to Ukraine, with additional funding for the EU training mission (EUAM Ukraine) and medical equipment. However, the EPF has also engendered a more drastic cultural change in terms of EU security and defence assistance in third countries. Within days of the onset of the Russian invasion, the EU for the first time supported the delivery of lethal equipment to a third country through the EPF.¹⁴⁴ Moreover, additional initiatives, in particular the ammunition initiative, which resulted in the procurement-track for ASAP, have devoted additional means to support Ukraine with ammunition.

Textbox 3: The European Peace Facility's Decision-Making

Funding through the EPF works mainly in two ways: either through direct support to third countries (mainly Ukraine) or by reimbursing the procurement of equipment provided as an assistance or support measure. EPF-funded measures are subject to unanimity and discussed in the Political and Security Committee (PSC) and decided in the Council. To safeguard the implementation of EPF measures under the assistance pillar, an Integrated Methodological

141. European Union, "Council Decision (CFSP) 2021/509 of 22 March 2021 Establishing a European Peace Facility, and Repealing Decision (CFSP) 2015/528," 2021, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021D0509>.

142. Marijn Hooijink and Hanna Muehlenhoff, "The European Peace Facility and the Legitimation of European Arms Exports," *E-International Relations* (blog), 2021, <https://www.e-ir.info/2021/06/01/gunning-for-peace-the-european-peace-facility-and-the-legitimation-of-european-arms-exports/>, see also EPF Interview.

143. European Council, "European Peace Facility", accessed May 2024, <https://www.consilium.europa.eu/en/policies/european-peace-facility/>.

144. Interviews 4, 8.

Framework has been formulated,¹⁴⁵ which sets forth rules for implementation as well as possibilities to terminate or suspend measures, as in Mali and Niger in response to the coups in 2023.¹⁴⁶

In terms of support to Ukraine, the EPF was thus both the most visible instrument and, among policy-makers, also regarded as a successful intervention that did work to the end of increasing the EU's global role and perception.¹⁴⁷ The agreement to top up the budget twice since February 2022 further underlines the political significance of the instrument for member states and EU institutions, such as the EEAS and Commission. Through the EPF, the EU arguably emerged as a 'key supporter' of Ukraine in terms of military equipment¹⁴⁸ and provided a prompt, united response to Russian aggression. It was also noted, however, that the EPF changed the culture of assistance measures through the provision of lethal equipment for a third country for the first time in EU history.¹⁴⁹

However, while the EPF represented an effective instrument to provide aid at the onset of the war in Ukraine, it faces considerable obstacles. Challenges remain, not least in terms of unanimity and single member states blocking support measures over domestic political issues,¹⁵⁰ as Hungary did over a bilateral dispute with Ukraine over how the latter blacklisted the Hungarian OTP Bank.¹⁵¹ Nevertheless, from the perspective of the EU, the EPF is framed as a 'success story' and is claimed to have altered the role of the EU as a global security actor.¹⁵²

145. European Union, Questions and Answers on the European Peace Facility's Integrated Methodological Framework, Accessed May 23 2024. https://www.eeas.europa.eu/eeas/questions-and-answers-european-peace-facility%E2%80%99s-integrated-methodological-framework-0_en.

146. Interview 3.

147. Ibid.

148. Ibid.

149. Interview 8.

150. Interviews 1, 2, 4.

151. Mathieu Pollet, "Kyiv Removes Hungary's OTP Bank from Blacklist in Bid to Unlock EU Aid," *Politico Europe*, 2023, <https://www.politico.eu/article/ukraine-nacp-removes-hungary-bank-otp-blacklist-unlock-eu-military-aid/>.

152. Interview 3.

4.2. Global Action through Crisis Response: The CSDP Missions

In more concrete CSDP terms, missions and operations were the main instrument for the EU to become active beyond the bloc's borders. Under the umbrella of 'crisis management', the EU has launched over 40 missions and operations outside its territory between 2003 and 2021, mostly in Africa (e.g., EU Training Mission Somalia) and the Western Balkans (e.g., EUFOR Althea in Bosnia and Herzegovina), but also in the neighbourhood to the east (EU Monitoring Mission in Georgia) and even naval missions (Atalanta, Sophia, and Irini).¹⁵³ A distinction can be drawn between military and civilian missions; of the 22 active missions, 13 are civilian while 9 are military.¹⁵⁴ Missions are usually initiated upon request by and in close coordination with the host nation through a Council decision and in the PSC. They then move to the respective planning capability within the EEAS – either the Civilian or Military Planning and Conduct Capability (CPCC or MPCC). Consequently, they are staffed by national civil security personnel (e.g., police and military officers), depending on the nature of the mission. While the scope and objective of military operations are usually narrower in military terms, civil missions can assume a very broad array of non-military tasks.¹⁵⁵ This can comprise police assistance missions, such as EUPOL COPPS in the Palestinian Territory in the West Bank, which works towards police reform in the Palestinian Authority, or judicial missions overseeing justice system reforms, such as EULEX in Kosovo, which is the largest civilian mission in the CSDP framework. Missions therefore extend the military domain of security by including other EU security

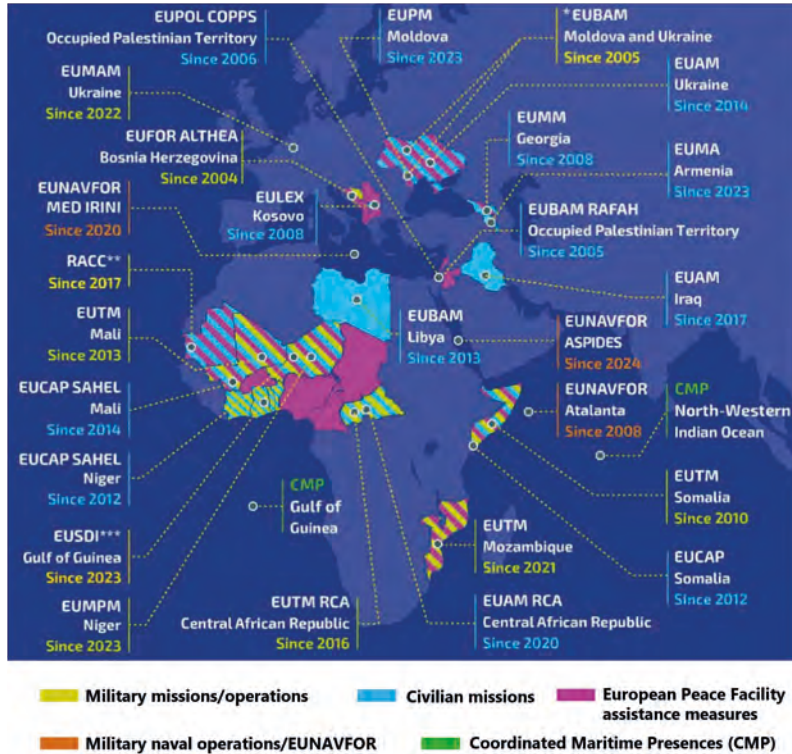
153. Howorth, "The EU's Security and Defence Policy: A New Leap Forward?" 311.

154. European External Action Service: "Factsheet: CSDP Missions and Operations", Accessed May 24 2024, https://www.ecas.europa.eu/sites/default/files/documents/2023/EU-mission-and-operation_2023_2_0.pdf.

155. Panos Koutrakos, *The EU Common Security and Defence Policy*, 1st ed, Oxford European Union Law Library (Oxford: Oxford University Press, 2013), 133.

priorities, such as the Border Assistance Missions, or with work in fields such as counter-terrorism,¹⁵⁶ hybrid threats, and cybersecurity.¹⁵⁷

Figure 3: Map of CSDP Missions¹⁵⁸



*This mission is not managed within CSDP structures.
 **The Regional Advisory and Coordination Cell is a CSDP action which facilitates EU support to security and defence cooperation amongst Sahel countries (Mauritania, Mali, Burkina-Faso, Niger and Chad).
 ***The EU Security and Defence Initiative/Gulf of Guinea aims to empower Côte d'Ivoire, Ghana, Togo and Benin to strengthen their security and defence capabilities.

156. Julien Jeandesboz, "Intervention and Subversion: The EU Border Assistance Mission to Moldova and Ukraine," *Journal of Intervention and Statebuilding* 9, no. 4 (October 2, 2015): 442–70, <https://doi.org/10.1080/17502977.2015.1087194>; Bruno Oliveira Martins and Laura C. Ferreira-Pereira, "Stepping inside? CSDP Missions and EU Counter-Terrorism," *European Security* 21, no. 4 (December 2012): 537–56, <https://doi.org/10.1080/09662839.2012.688814>.
157. Interview 5.
158. European External Action Service: Factsheet: CSDP Missions and Operations.

The MPCC and CPCC both work autonomously and report to the PSC, which gives the member states direct oversight over the missions. However, while military and civilian missions are often described as two parts of a larger strategic goal in strategic documents (e.g., as part of the ‘Act’-Chapter in the Strategic Compass¹⁵⁹), their cooperation has been described as superficial, especially on the level of the two planning committees.¹⁶⁰ On the ground, cooperation is described as much more vital and profitable, which also results from civilian and military missions placed in the same country sharing infrastructure and in some instances even contacts to the host-nation government.¹⁶¹ In terms of the planning committees, this is also partially explained by the lack of staff to communicate and cooperate with one another.¹⁶² The MPCC in particular will see a staff increase, however, as its role will also expand as the preferred Command and Control (C2) structure of the Rapid Deployment Capacity (RDC), which was announced in the Strategic Compass as a major instrument enabling the EU to act. The RDC emerged out of the failed ‘battlegroups’ approach to provide the EU with the military capability to rapidly deploy personnel to global crisis situations, thereby underpinning the more global approach of the CSDP.¹⁶³

In terms of military capabilities and crisis management, the RDC is the most visible change in the CSDP since February 2022, albeit unrelated to the war but rather as a product of the SC. With the RDC and growing role of the MPCC, the role of militaries within the EU is seen as growing, both in terms of missions as well as in the provision of capacities for crisis response.¹⁶⁴ The missions themselves have been described as affected less by the Russian invasion of Ukraine and more by the globally changing security environment; for example, the missions in Mali and Niger were affected by the coups and the ensuing presence of the Wagner

159. European Union, “A Strategic Compass for Security and Defence,” 31.

160. Interviews 5, 10.

161. Interview 6.

162. Yf Reykers and Johan Adriaensen, “The Politics of Understaffing International Organisations: The EU Military Planning and Conduct Capability (MPCC),” *European Security* 32, no. 4 (October 2, 2023): 519–38, <https://doi.org/10.1080/09662839.2022.2142040>.

163. Christoph O. Meyer, Ton Van Osch, and Yf Reykers, “From EU Battlegroups to Rapid Deployment Capacity: Learning the Right Lessons?,” *International Affairs* 100, no. 1 (January 8, 2024): 181–201, <https://doi.org/10.1093/ia/iia247>.

164. Interview 6.

Group in the respective countries.¹⁶⁵ Nevertheless, the setup of new missions, such as the EU Partnership Mission (EUPM) in Moldova that was launched in 2023 and the EU Military Assistance Mission (EUMAM) in Ukraine (see textbox), launched in 2022, demonstrates the focus of new missions on the so-called Eastern Neighbourhood. While at first glance this appears to offer a clear indication of how the missions have changed in response to the Russian aggression in Ukraine, this change is grounded in an understanding of the EU as a more credible security provider after the illegal annexation of Crimea in 2014, which is also apparent in the setup of the Advisory Mission (EUAM) in December 2014 or even in Georgia after the war in 2008.¹⁶⁶ For the EU, the missions remain an important means to act globally in the context of the CSDP, and the creation of the RDC is seen as a necessary complementary measure aimed at improving reaction capacities that would not always require missions.

Textbox 4: EUPM Moldova and EUMAM Ukraine as Reactions to Russian Aggression

Two missions stand out in the reaction to the Russian invasion of Ukraine in February 2022: the EU Military Assistance Mission (EUMAM) in Ukraine and the EU Partnership Mission (EUPM) in Moldova. Initiated in late 2022 and in 2023, respectively, EUMAM represents a military response, whereas EUPM also works to draw attention to a country threatened by Russian aggression, secession movements in Transnistria, and hybrid attacks. EUPM is the first mission specifically engaging with hybrid attacks and cyber-defence, as they have represented an increasing threat to Moldova in the recent past.¹⁶⁷ For EUMAM, the mission builds on structures of the EU Advisory Mission (EUAM), launched in 2014 in response to the war in Donbas and the illegal annexation in Crimea. EUMAM represents the first military mission in Ukraine and aims at providing training and planning capacities to the Ukrainian Armed

165. Interview 5.

166. Interviews 5, 10.

167. Interview 5.

Forces.¹⁶⁸ Both these missions represent an important reaction to the Russian aggression and to strengthen the EU position in its Eastern Neighbourhood.

4.3. Complementing or Competing? The NATO Cooperation as Measuring Stick of EU Actorness

As the Strategic Compass describes, partnerships are an important tool for the EU to improve its role as security provider. Partnerships are described as beneficial for a multilateral order but also for the role of the EU as a ‘global strategic player’.¹⁶⁹ By describing the EU’s international relations and the significance of its neighbourhood, the Compass chapter on partnerships sets forth the strategic significance of partnerships, thereby also casting light on the priorities in terms of partnerships and neighbourhood policies. Although the EU seeks partnerships around the world on different levels (e.g., regional with ASEAN or the African Union, and nationally with Canada, the US, Norway, and post-Brexit UK), it prioritises certain partnerships.

In this context, the most important security and defence partnership for the EU is NATO, particularly in the wake of the Russian invasion of Ukraine. The newfound sense of respective importance between the two institutions is summed up in the changing viewpoint of French President Macron, who despite calling NATO ‘brain dead’ in 2019 nevertheless reiterated the importance of NATO for European security in 2023. Politically, the renewed partnership is reflected in the 2023 Joint Statement between EU and NATO,¹⁷⁰ which acknowledged the mutually beneficial cooperation between the two institutions according to their possibilities. The Russian invasion of Ukraine has also had a substantial

168. European Union Military Assistance Mission Ukraine (EUMAM), Factsheet. <https://www.eeas.europa.eu/sites/default/files/documents/2023-EUMAMUkraine.pdf>

169. European Union, “A Strategic Compass for Security and Defence.”

170. European Union and NATO, “Joint Declaration on EU-NATO Cooperation by the President of the European Council, the President of the European Commission, and the Secretary General of the North Atlantic Treaty Organization,” 2023, https://www.nato.int/nato_static_fl2014/assets/pdf/2023/1/pdf/230110-cu-nato-joint-declaration.pdf.

impact on the EU-NATO partnership on the administrative and practical levels in terms of reinforcement.¹⁷¹ Already before the onset of the war in Ukraine, the EU and NATO have constantly been exchanging information¹⁷² and collaborated on topics such as hybrid threats, maritime security, and cyber security.¹⁷³

Nevertheless, even in the light of improving cooperation, challenges remain. By attempting to complement NATO and the EU avoiding the emulation of what NATO does,¹⁷⁴ in the perception of many EU member states, NATO remains the primary security provider in Europe, even though stronger EU forces are also seen as strengthening NATO.¹⁷⁵ Moreover, with four member states (Austria, Cyprus, Ireland, and Malta) not being NATO members and for various reasons unlikely to join NATO,¹⁷⁶ member states take different approaches towards the forms and extent of NATO involvement in defence matters.¹⁷⁷ These member states therefore traditionally seek to strengthen EU structures, as they view the EU as their primary security provider. This development is tied to the question of strategic autonomy, where the EU has attempted to emancipate itself as a security actor by establishing its own capability development structures.¹⁷⁸

The Euro-Atlantic partnership thus puts the EU in a paradoxical position as a security actor: On the one hand, NATO is crucial to European security, and the EU can therefore play a central role in enabling this relationship, thereby showing its role as a strong partner that facilitates capa-

171. Catherine Hoeffler and Stephanie C. Hofmann, "Organizational Overlap and Bureaucratic Actors: How EU-NATO Relations Empower the European Commission," *JCMS: Journal of Common Market Studies*, January 22, 2024, jcms.13571, <https://doi.org/10.1111/jcms.13571>.

172. Interview 6.

173. European Union and NATO, "Seventh Progress Report on the Implementation of the Common Set of Proposals Endorsed by EU and NATO Councils on 6 December 2016 and 5 December 2017," 2022, <https://www.consilium.europa.eu/media/57184/eu-nato-progress-report.pdf>.

174. Interview 4.

175. Interview 8.

176. Reasons encompass neutrality being enshrined in the constitution in Austria and Ireland or the frozen conflict between Cyprus and Turkish-Occupied Northern Cyprus.

177. Interviews 1, 6.

178. Jolyon Howorth, "Strategic Autonomy and EU-NATO Cooperation: Threat or Opportunity for Transatlantic Defence Relations?," *Journal of European Integration* 40, no. 5 (July 29, 2018): 523–37, <https://doi.org/10.1080/07036337.2018.1512268>.

bility development, which in turn also strengthens NATO capacities.¹⁷⁹ On the other hand, NATO undermines the EU's position as security actor by virtue of how many EU member states view it as their primary security provider, as it often can merely complement what NATO is doing. Topics of collective defence remain with NATO, prompting predominantly more Eastern European states to rely on NATO for their security.¹⁸⁰ While the transatlantic relationship has clearly been reinforced as a result of the Russian aggression in Ukraine, it also opens questions about the role of the EU as a primary security provider.

4.4. A Global Security Actor in the Making?

The oft-cited 'rough awakening' that the EU experienced on 24 February 2022 has resulted in what can be described as a cultural shift in EU security and defence. This reflects especially in the provision of lethal military means to Ukraine through the EPF and the increased salience of defence and military issues in EU policy debates. However, the war in Ukraine should be seen more as an accelerator of already ongoing endeavours and less as a full-fledged culture shift. Von der Leyen's announcement of a 'geopolitical Commission' upon taking office already underlined the ambitions that she and her college of Commissioners put forth for their period in office.¹⁸¹ Moreover, instruments such as the EPF and the missions were already in place, and ambitions in terms of the RDC and similar projects, such as Military Mobility,¹⁸² which should serve to make European militaries more flexible, also emerged before the full-scale Russian invasion of Ukraine. After February 2022, however, those structures and endeavours gained new momentum and – most conspicuously in the EPF – saw their roles and functions changing

179. Jolyon Howorth, "EU–NATO Cooperation: The Key to Europe's Security Future," *European Security* 26, no. 3 (July 3, 2017): 454–59, <https://doi.org/10.1080/09662839.2017.1352584>.

180. Elie Perot, "The European Union's Nascent Role in the Field of Collective Defense: Between Deliberate and Emergent Strategy," *Journal of European Integration*, July 24, 2023, 1–23, <https://doi.org/10.1080/07036337.2023.2237653>.

181. Haroche, "A 'Geopolitical Commission.'"

182. Calle Håkansson, "The Strengthened Role of the European Union in Defence: The Case of the Military Mobility Project," *Defence Studies* 23, no. 3 (July 3, 2023): 436–56, <https://doi.org/10.1080/14702436.2023.2213647>.

drastically and rapidly. In that sense, the new security situation resulting from the war in Ukraine has stressed the existing structures, and while some weaknesses (e.g., in terms of understaffing) were exposed, the EU has attempted to demonstrate its ability to be a credible security actor. The EPF is worth highlighting here, as it enabled the EU to draw on an extensive budget to become one of Ukraine's main supporters in the aftermath of the invasion.

Nevertheless, with the presence of NATO and most EU members being NATO members, many member states continue to view the transatlantic partnership as the major security provider. From the EU's perspective, fostering cooperation with NATO has shown that the EU accepts its inability to emulate what NATO does, and the focus has therefore been put on initiatives to complement NATO or to strengthen the roles of the member state militaries within NATO.¹⁸³ NATO regards the EU as a crucial partner, as the Alliance's Strategic Concept makes clear: 'NATO and the EU play complementary, coherent and mutually reinforcing roles in supporting international peace and security'.¹⁸⁴ In this sense, the more global outreach of the CSDP through missions and the RDC underpins EU ambitions to extend NATO's dimension of collective defence and to become a global security provider.

While the EU has taken considerable steps towards becoming a security actor, also beyond its borders, it is still not perceived as a major security actor when it comes to collective defence and global action. This is also tied to the objective of autonomy, as capability development and the capacities for crisis management (and possibly even collective defence) are strongly entangled. Thus, the EU establishing itself as a major global security actor in a changing security environment will depend on the success of initiatives such as the RDC, the newly initiated missions in the Eastern Neighbourhood, but also continued support to Ukraine through the EPF. While this shift might not mean that the EU will replace NATO as the major security provider in Europe, it shows ambitions of global visibility. It must be said, however, that many of the developments remain in the proposal stage for the time being.

183. Interview 8.

184. NATO, "NATO 2022 Strategic Concept," 2022, https://www.nato.int/nato_static_files2014/assets/pdf/2022/6/pdf/290622-strategic-concept.pdf.

5

Member States in the CSDP: Strategies, Alliances and Decision-Making

In the weeks and months after the Russian invasion of Ukraine, the political discourse shifted drastically in Brussels and in member states' capitals. Political reactions to the Russian aggression were swift, far-reaching, and consequential; Denmark decided in June 2022 to end its opt-out on EU CSDP, Finland joined NATO in April 2023, and they were followed by Sweden in March 2024. Additionally, Poland increased its defence spending to almost 4% of the country's GDP¹⁸⁵ and, very prominently, only days after the Russian invasion, German Chancellor Olaf Scholz proclaimed a turning point, the so-called *Zeitenwende* (see Textbox 5), in security and defence, announcing an additional €100 bn package for the German Bundeswehr.¹⁸⁶ On the EU level, member states quickly reached agreement on sanctions and aid packages to Ukraine, including lethal instruments, through the EPF.¹⁸⁷ Considering these developments might provide reason to think that the war in Ukraine has spurred member state governments to put defence at the top of the agenda and to

185. Marek Strzelecki and Justyna Pawlak, "Scope of Poland's Spending Spree in Focus as NATO Ups Defence Goal," *Reuters*, July 12, 2023, <https://www.reuters.com/world/europe/scope-polands-spending-spree-focus-nato-ups-defence-goal-2023-07-12/>.

186. Tobias Bunde, "Lessons (to Be) Learned? Germany's *Zeitenwende* and European Security after the Russian Invasion of Ukraine," *Contemporary Security Policy* 43, no. 3 (July 3, 2022): 516–30, <https://doi.org/10.1080/13523260.2022.2092820>.

187. Interview 4.

strengthen EU security policy. Member states have moved at different paces since establishing this early momentum, however, and new complexities have emerged that are rooted in more fundamental structures of the CSDP.

With the CSDP remaining a mostly intergovernmental matter despite attempts at leaderisation and agencification, it is still national forces that provide capabilities and national industries that are mainly involved in ammunition and vehicle production. Moreover, budgetary decisions are taken on national levels, as the examples of Poland and Germany show, and defence integration is therefore proceeding at varying speeds. Moreover, the crucial role of member states in providing forces and capabilities means that different perceptions and politics of member states are reflected in the EU policy-making in the CSDP, which often engenders additional challenges, particularly in decision-making.

The differences and controversies among member states become visible in various topics, but there are two major categories. *First*, member states have distinct perceptions of the strategic environment, the prevalent threats, and how the EU is or should be responding to them. This also reflects the variations in member state priorities in terms of geographical and policy orientation. It is often argued that the background for these perceptions lies in the varying histories and geographies of the member states,¹⁸⁸ for example with France attempting to devote resources to missions and actions on the African continent, particularly the Sahel, whereas already since the illegal annexation of Crimea in 2014, the Baltic nations and Poland have represented a driving force to ramp up the defence against Russia. Poland and other Central and Eastern European member states have generally taken a stronger role in EU security since the Russian invasion.¹⁸⁹ Southern European member states (e.g., Italy, Spain, Greece) have traditionally prioritised policy areas without connection to the CSDP and rooted more in the Home Affairs pillar of the EU (e.g., migration and borders). Thus, while Italy under the far-right government of Giorgia Meloni has taken a transatlantic approach to security and defence and pushed for stronger EU action, this is main-

188. Interviews 1, 12.

189. Steven Erlanger, "Ukraine War Accelerates Shift of Power in Europe to the East," *New York Times*, January 26, 2023, <https://www.nytimes.com/2023/01/26/world/europe/eu-nato-power-ukraine-war.html>.

ly seen as a means to stimulating more EU-level discussion on migration and borders, as those issues remain at the top of the Italian security agenda.¹⁹⁰ Moreover, countries like Denmark and the Netherlands have ample interests in cyberdefence-related issues and emerging technologies, pushing for them to be higher priorities.¹⁹¹ The different national approaches thus make decisions on strategic orientation difficult, as they must strike compromises between the distinct positions of all 27 member states.

Second, member states differ in their approaches to alliances and what the various alliances should do. Here again, geography and history shape the respective national positions. Finland's swift decision to join NATO was spurred by their shared border with Russia;¹⁹² similarly, the Baltics and Poland rely more on NATO and the transatlantic partnership because of the more imminent Russian threat.¹⁹³ The approach to alliances is also reflected in approaches to capability development, autonomy, and the role of the EU as a security actor. While France has assumed a leading role in pushing for 'strategic autonomy', Germany is more cautious in this matter, which can be seen as a result of the historical French scepticism towards NATO and Germany's more transatlantic perspective.¹⁹⁴ Also in Poland, the orientation towards NATO is dominant, as for EU measures in autonomy, a 'key condition has been set for the Union not to duplicate, much less compete with NATO'.¹⁹⁵ In this, Poland and Germany are close to the Danish position, where observers have argued that '[t]he country is terrified that increasing [strategic autonomy] risks detaching the US from Europe.'¹⁹⁶

190. Nathalie Tocci and Leo Goretti, "Giorgia Meloni's Italy and Europe: Ambitions and Realities," IAI Commentaries (Rome: Istituto d'Affari Internazionali, 2023).

191. Interviews 2, 4.

192. William Alberque and Benjamin Schreer, "Finland, Sweden and NATO Membership," *Survival* 64, no. 3 (May 4, 2022): 67–72, <https://doi.org/10.1080/00396338.2022.2078046>.

193. Gajauskaitė, "Poland's Resilient Atlanticism"; Lucrezia Sapienza, "Russia and the Baltics: A Testing Ground for NATO–EU Defence Cooperation," IAI Commentaries (Rome: Istituto d'Affari Internazionali, 2018).

194. Banka, "Germany. The Renewed Quest for Strategic Autonomy"; Kuokštytė, "Revisiting France's Commitment to Defence Integration.," Interview 12.

195. Gajauskaitė, "Poland's Resilient Atlanticism", 63.

196. Theussen, "European Strategic Autonomy: Opportunities and Threats for Denmark," 147.

Conversely, countries that have historically remained neutral (Austria, Malta, Ireland, and Cyprus), often push for stronger EU engagement, as they cannot shape NATO decisions. However, neutral states face the specific challenge that they must refrain from certain political issues; for example, they cannot provide lethal aid to Ukraine.¹⁹⁷ This not only challenges their specific position but affects the position of the EU as security actor as a whole – as the ‘Irish clause’ makes visible, which ‘effectively [is] giving them an opt-out from EU mutual defence in case of an attack.’¹⁹⁸ Neutrality thus remains a contentious issue through which neutral member states have the ambiguous role of attempting to foster the CSDP while at the same time not being fully able to contribute.

Against the backdrop of the roles and individual security and defence policies of member states, the EU endeavour to become a stronger security actor is sometimes at odds with member state interests. These often (extremely) varying interests are reflected in voting structures and decision-making in bodies, such as the FAC and PSC, where decision-making often poses a considerable challenge. This becomes particularly conspicuous with respect to the unanimity requirement. Unanimity is among the larger controversies in the CFSP and CSDP, as it has proven disadvantageous with respect to decision-making ability when single states block EU measures for domestic political reasons (e.g., the aforementioned case of the Hungarian OTP Bank), even though decisions were unanimous in the direct aftermath of the onset of the Russian invasion in Ukraine.¹⁹⁹ Spurred by the perceived gridlock in some issues, a so-called ‘Group of Friends’ consisting of nine countries (Belgium, Finland, France, Germany, Italy, Luxembourg, Netherlands, Slovenia, and Spain) attempted to launch a wider debate on Qualified Majority Voting (QMV) as a possible solution. The Lisbon Treaty sets forth possibilities for QMV, where it is defined as a majority of at least ‘55% of the members of the Council, comprising at least 15 of them, and representing Member States comprising at least 65% of the population of

197. Clara Sophie Cramer and Ulrike Franke, “Ambiguous Alliance: Neutrality, Opt-Outs, and European Defence” (European Council on Foreign Relations, 2021), <https://ecfr.eu/publication/ambiguous-alliance-neutrality-opt-outs-and-european-defence/>.

198. Cramer and Franke, “Ambiguous Alliance”, 4.

199. Interviews 1, 2, 4.

the Union.²⁰⁰ However, a group of different member states (namely Poland, Hungary, Czechia, Greece, Cyprus, Malta, Bulgaria, and Croatia) have underscored their preference for unanimity.²⁰¹ While some have argued that QMV would make the EU more flexible and effective, others express concerns that QMV could result in the overriding of smaller member states and the weakening of their respective positions in negotiations, but this also holds the danger that the EU will be perceived as less united, which would undermine its role as a security actor.²⁰²

Textbox 5: Germany after the *Zeitenwende*

On 27 February 2022, just days after Russia invaded Ukraine, German Chancellor Olaf Scholz held a speech in the German Bundestag that some have described as historic.²⁰³ Coining the term *Zeitenwende*,²⁰⁴ German for ‘turn of tides’, Scholz declared that a new era had begun in security and defence for Germany and Europe alike. The key proposal in the speech was a €100 bn package for the German military forces through which they should, after years of underinvestment, be able to build credible military power and improve defence capabilities for the country.²⁰⁵ Germany, which was heavily criticised for acting slowly in the first months after the invasion, emerged as one of the larger supporters of Ukraine, not least in the delivery of arms and providing substantial funding.²⁰⁶

200. European Parliament Research Service, *Qualified Majority Voting in Common Foreign and Security Policy*.

201. Ibid.

202. Interviews 1, 2, 4.

203. Bunde, “Lessons (to Be) Learned?”; Angela Mehrer, “Turn of Phrase: Germany’s *Zeitenwende*,” *European Council of Foreign Relations* (blog), August 15, 2022, <https://ecfr.eu/article/turn-of-phrase-germanys-zeitenwende/>; Benjamin C. Tallis, “The *Zeitenwende* Is Here, It’s Just Unevenly Distributed,” *Internationale Politik Quarterly* (blog), September 4, 2023, <https://ip-quarterly.com/en/zeitenwende-here-its-just-unevenly-distributed>.

204. Bundesregierung, “Policy Statement by Olaf Scholz, Chancellor of the Federal Republic of Germany and Member of the German Bundestag, 27 February 2022 in Berlin,” 2022, <https://www.bundesregierung.de/breg-en/news/policy-statement-by-olaf-scholz-chancellor-of-the-federal-republic-of-germany-and-member-of-the-german-bundestag-27-february-2022-in-berlin-2008378>.

205. Interview 12.

206. Veronika Melkozerova, “German Defense Minister Announces €1.3B Weapons Package during Visit to Kyiv,” *Politico Europe*, 2023, <https://www.politico.eu/article/german-defense-minister-announces-new-military-aid-package-during-his-visit-to-kyiv/>.

However, what the *Zeitenwende* means for Germany (and in extension for the EU) is difficult to estimate. While there has been ample movement within Germany's military, the substantial changes in terms of defensive capabilities are not yet tangible or visible;²⁰⁷ nevertheless, also in the 2023 security strategy,²⁰⁸ Germany as the currently largest military in the EU has shown a visible reaction to the Russian invasion of Ukraine together with ambitions to emerge as a major security actor within both the EU and NATO. This also instils stronger trust among Germany's neighbours, particularly in Eastern Europe.²⁰⁹

Balancing member state interests is, thus, a crucial element in the EU endeavour to strengthen its position as security actor. While the EU-27 achieved unanimity in central questions of aiding Ukraine and sanctioning Russia in the direct aftermath of the Russian invasion of Ukraine, compromises are usually much more complicated and difficult to achieve, and they have since proven to be more contentious.²¹⁰ This section has shown how member state interests are not simple rational decisions; rather, they involve complex, multifaceted positions partly resulting from contrasting geographies and histories. Thus, while integration in the areas of security and defence can be facilitated by voting mechanism reforms, overcoming the variety of positions remains the major challenge if the EU seeks to become a stronger security actor. With the dependence on national capabilities and budgets, however, it is one of the most crucial challenges currently facing EU institutions.

207. Interview 12.

208. Bundesregierung, "Robust. Resilient. Sustainable. Integrated Security for Germany," 2023, <https://www.nationalesicherheitsstrategie.de/National-Security-Strategy-EN.pdf>.

209. Vladimír Handl, Tomáš Nigrin, and Martin Mejstřík, "Turnabout or Continuity? The German *Zeitenwende* and the Reaction of the V4 Countries to It," *Journal of European Integration* 45, no. 3 (April 3, 2023): 503–19, <https://doi.org/10.1080/07036337.2023.2190110>.

210. Interview 4.

6

Conclusions and Recommendations

The full-fledged Russian invasion of Ukraine was widely regarded as heralding a new European reality in which war and great-power politics once again shape the strategic continental environment,²¹¹ something that many have thought to be unrealistic after Francis Fukuyama infamously wrote about the *End of History*²¹² in the early 1990s. This has also impacted the political debate in Brussels and capitals across the continent. While topics such as terrorism and migration have dominated debates around EU security, particularly since the early 2000s, security and defence have emerged since February 2022 as central topics, which is also reflected in public statements by the Commission President and high-ranking political figures. These new realities were the impetus for this report to explore the consequences of the larger strategic debate on the more specialised policies and practices of the Common Security and Defence Policy.

6.1. Main Findings

At the core of many debates related to EU security and defence lies the question of whether the EU can become a security provider both to its member states and beyond. This questions requires to thoroughly

211. European Union, “A Strategic Compass for Security and Defence.”

212. Francis Fukuyama, *The End of History and the Last Man* (New York: Free Press, 1992).

unpack how EU endeavours to become a security actor are shaping its policies and practices. The report has described how these endeavours predated the Russian invasion of Ukraine by laying out the established frameworks through the Lisbon Treaty, the Global Strategy, and the existing initiatives. Nevertheless, after February 2022, many observed a drastic change in discourse and culture that has since propelled new forms of practices, such as the provision of lethal gear to Ukraine and the increased funding of ammunition procurement. However, the changes in discourse and culture have yet to produce new forms of institutional setup; rather, security and defence policy builds on the structures existing before February 2022, and the momentum was mainly used to shove these instruments more to the forefront.²¹³ Changes thus materialised more in the areas of political logics and practices, raising questions regarding their sustainability. Against this backdrop, the report has outlined how parts of the often complex, intertwined institutional framework have changed their approaches in the wake of the Russo-Ukrainian War.

This report has analysed the EU security and defence reaction to the full-scale Russian invasion of Ukraine, particularly in the context of the CSDP but also in terms of instruments that are not technically part of the CSDP, such as the EPF or the EDF, through two lenses. First, it assessed the more internal shifts in terms of capability development, autonomy, and defence industrial capabilities. Here, changes were mostly visible in terms of recognising the EU needs and requirements in this field, which engendered initiatives such as ASAP, EDIS, and EDIRPA while also enabling practices such as joint procurement. Obviously, the pressure that the security situation puts on the EU creates a perceived necessity for quick action, possibly resulting in unsustainable structures. Conversely, these circumstances might impede member state willingness to devote resources to long-term cooperation projects, as the needs are regarded as timely and urgent.²¹⁴ Nevertheless, initiatives that have emerged under the policy rationale of autonomy (e.g., PESCO, EDF EDIS) are mostly regarded as useful both in Brussels and the member states, and they represent the most visible parts of the wider security and defence efforts.

213. Fiott, "In Every Crisis an Opportunity?"

214. Interview 9.

Collaborative PESCO and EDF projects will have to prove their significance, and whether the EU security and defence industry will receive the boost desired by both the Commission and member states remains to be seen. Nevertheless, the war in Ukraine and the changing strategic environment have ostensibly spurred developments that are contributing to the expansion of EU security and defence capabilities.

Major obstacles remain for the second dimension of the EU: attempting to become a global security actor. While the EPF has put the EU on the map as a key provider of support to Ukraine and coming proposals (e.g. the Ukraine Facility) should further underline the significance of EU support, the EU faces major challenges in its visibility and effectivity as a global security actor. While the EU is active on a more global scale in the form of its CSDP missions, these missions face challenges regarding EU governance together with questions on the ground pertaining to their effectiveness.²¹⁵ Still, the missions remain an important instrument for visibility and crisis management, and the planned introduction of the RDC in 2025 is aiming to improve EU crisis management capabilities. The missions and RDC underpin the EU endeavour to become a security actor on the global stage.

One key finding of the report is that practitioners widely view the Strategic Compass as helpful towards fostering EU ambitions by being slightly less ambitious, albeit more structured and clearer as compared to the EUGS. The SC is, hence, an important addition to the EUGS, as it specifically fleshes out strategic approaches to security and defence. The SC has therefore rendered the EU endeavour to become a stronger security actor more measurable on a policy level, as this is actor-dependent with respect to the success of implementing the objectives in the Compass. On the global level, however, other institutions, most notably NATO, remain the dominant security actors, mostly by virtue of their military might. In that sense, the goals of an autonomous Europe and a global Europe have found to be intersecting, as it has often been argued

215. Ana E. Juncos, “Civilian CSDP Missions: ‘The Good, the Bad and the Ugly,’” in *Research Handbook on the EU’s Common Foreign and Security Policy*, ed. Steven Blockmans and Panos Koutrakos, Research Handbooks in European Law (Cheltenham: Edward Elgar, 2018), 89–110.

that the EU can only succeed as a global security actor if it achieves substantial autonomy.²¹⁶

The shifting priorities and wider range of action for the EU notwithstanding, Russia attacking Ukraine also engendered the resurgence of NATO as the primary security provider in Europe. Eastern European member states in particular remain very adamant about NATO as the primary security provider,²¹⁷ and that role has increased further since Finland and Sweden joined NATO. The role of the EU towards NATO is thus seen more as possibly a complementary, cooperative one and less as becoming the primary security provider on the European continent. However, concerns about a NATO retreat or US military resources following the shifting American attentions towards the Pacific and Asia upon a possible re-election of Donald Trump as president have engendered debates concerning the degree of EU preparedness – both in terms of supporting Ukraine and in providing security to the European continent.²¹⁸ Indeed, the prevailing debate about autonomy is grounded in concerns with the inability of the EU to provide security in the case of a receding role of NATO. Paradoxically, this means that one of the biggest challenges (and even threats) might also become a central moment in the definition of the EU as a security actor.

In this context, the Danish decision to end the security and defence opt-out occurred at a time when the field is both changing rapidly and there is perceived momentum for achieving progress in terms of EU security and defence policy. As the report has shown, the EU efforts at establishing itself as a security actor have been ongoing particularly after the EUGS, but they have gained additional momentum in the aftermath of the Russian invasion of Ukraine. The EU seeks to become both a more autonomous actor to provide its own capabilities as well as a more globally visible security actor through a variety of political actions presented in this report. Denmark thus joined the CSDP at a critical juncture.

216. Meijer and Brooks, “Illusions of Autonomy.”

217. Gajauskaitė, “Poland’s Resilient Atlanticism.”

218. Interview 8.

6.2. Recommendations

With these findings in mind, it is recommended that Denmark should mainly follow three political steps after the end of the opt-out. For Denmark, joining the CSDP bears considerable potential, both as a political actor and for the armed forces. These recommendations are thus formulated to the end of navigating the field of security and defence and consequently showing how Denmark can both maximise its gains from its full inclusion in the CSDP as well as understanding the challenges ahead. The recommendations should both help Danish decision-makers with respect to how they can shape the CSDP in Brussels as well as in terms of how to develop strategies for how to work with the changes to the structure of Danish security and defence through the end of the opt-out. However, these three more specific recommendations rest upon a more general change that is deemed necessary. Effective use of the EU structures requires a thorough analysis of the Danish role in the EU and EU processes. This encompasses a learning process about the transformations through the CSDP together with a changed perception of the EU. While NATO remains Denmark's central strategic direction for the time being, EU security and defence policy should be seen in Denmark as complementing the function of NATO, particularly with respect to capability development and more global action. This leads to the three more specific recommendations that this analysis has produced.

Understand capability development as mutually beneficial:

While Denmark was already part of the EDF, cooperative measures under the EDA, such as PESCO, and recently also joint procurement were not accessible for Danish actors. With the end of the opt-out and the subsequent joining of the EDA, the Danish Armed Forces can now contribute to these projects and engage in EU capability-planning processes. To this end, this reports views three points as useful.

First, Denmark should *develop a position on autonomy that allows for beneficial engagement*. Policy initiatives resulting from the logic of autonomy are complementing both the transatlantic relationship as well as domestic political decisions. They can be used specifically to improve the capabilities of the Danish Armed Forces, which is profitable on a national level, on an EU level, and within NATO. Initiatives such as ASAP can be used in the short-term to provide military aid to Ukraine, while

long-term strategies such as EDIS provide a framework within which Danish capability needs can be aligned.

Second, Denmark should *identify relevant PESCO projects and be active in new initiatives*. Doing so could increase the interoperability of the Danish Armed Forces with other EU militaries, and Denmark could play a leading role in setting EU-level standards. To this end, establishing a taskforce that develops a strategy for Denmark within PESCO would be an effective step towards identifying future partners and interesting existing consortia. Furthermore, since Denmark is now also able to shape the capability priorities of the EU in the future, the country should formulate its specific interests in terms of hybrid threats and emerging technologies, and Denmark should translate them into cooperative projects.

Third, Denmark should *engage in research and innovation on emerging technologies*. Emerging technologies, such as AI, represent a reality in security and defence and are thus of great significance for EU security. With its strong network of research institutions, Denmark should play an active role in forming consortia for EDF projects that develop cutting-edge technologies. Denmark would thereby also reduce its reliance on the supply from outside Europe in a critical technological field.

Define a Danish position through partnerships and agenda-setting

Denmark has longstanding credibility in international action and security policy. This position is advantageous towards becoming a member state that drives a realistic agenda while also mediating between member states in terms of possible differences. Longstanding NATO membership renders Denmark an important part of navigating the partnership between the two institutions and within the EU itself. The perception of Denmark as a credible but reserved member can foster the position to achieve necessary compromises. Denmark should therefore pursue three concrete elements.

First, Denmark should *forge strategic partnerships with EU members that share interests*. This would mean that, in the complex decision-making processes on CSDP matters, Denmark does not remain isolated, instead either pushing for its interests in cooperation with others or balancing as a credible actor. These partnerships should be forged alongside topics of relevance for Denmark; for example, by pushing for more assistance to Ukraine or increasing capability development measures. In this sense, states with similar strategic outlooks as Denmark and which are more transatlantic represent likely partners.

Second, Denmark should attempt to *set an agenda in fields of relevance*. While the war in Ukraine will naturally remain at the top of the EU security and defence agenda, there are multiple emerging fields of interest for Denmark. Hence, Denmark should identify these areas and seek to leverage its position to push certain topics. This specifically comprises areas of hybrid threats, cyberdefence, and recently also the use of AI in defence applications.

Third, Denmark should *act as a mediator between older and newer member states*. Danish transatlantic tradition render the country a more natural ally for countries like Poland, which shares a similar strategic vision. Being an EU member since 1973, however, Denmark also has high credibility among longstanding EU members. Denmark could therefore balance and mediate positions that foster stronger European integration versus positions seeking more national directions. In so doing, Denmark could promote a common EU position that is also based on international law and providing support to Ukraine, as some member states are increasingly moving away from those positions.

Develop an ambitious but realistic agenda for the Council Presidency in 2025:

Denmark has a unique opportunity to leave a mark on the CSDP relatively soon after joining. With the Council Presidency coming up in the second half of 2025, Denmark could develop an ambitious agenda by making security and defence a priority of its presidency. While the conflicting interests among member states place obvious limits on the extent to which a Council Presidency can work, advancing the CSDP could possibly represent a topic with considerable chances of success. Moreover, the timing of the Danish presidency will coincide with a new Commission, which is likely to have a stronger focus on security and defence. In this context, three elements are important from the perspective of the results of this report, which strike a balance between administering and advancing EU security and defence policy.

First, Denmark should *set ambitious but realistic goals for security and defence*. This means that integrating defence efforts, especially in terms of implementing the Strategic Compass objectives, should remain a focal point. Here, the Danish Council Presidency should focus on the goals set out in the SC and work towards guaranteeing their institutionalisation. However, being realistic also means abandoning lofty objectives, such as a European army, in favour of attainable objectives.

Second, following this, Denmark should *prioritise capability development programmes and processes*. These programmes are central to the EU role as security provider, but also important instruments for member states in overcoming challenges such as fragmentation or insufficient capacities. Therefore, strengthening structures such as the EDF as well as pushing to implement the EDIS represent both attainable and profitable objectives for the Danish presidency.

Third, Denmark should *balance the transatlantic partnership and the global reach of the CSDP*. While the transatlantic partnership has become less predictable, the Danish Atlanticist outlook is an ideal basis to balance between different strategic directions of member states. At the same time, specific measures, such as the implementation of the RDC scheduled for 2025, are useful in strengthening the global dimension of the CSDP. Although the implementation of such instruments is an endeavour for many institutions, the Danish Council Presidency should work to ensure that no obstacles emerge in this regard.

As mentioned above, these proposals are attainable by regarding the EU as not merely another option, but rather as the primary actor that complements NATO, particularly in terms of capability development and support to Ukraine through the EPF. This would also mean establishing an institutional culture that considers the EU as a major element in Danish security and defence. With the complexity of EU institutional frameworks and often very specific ways of how things happen in Brussels, this is obviously a process that cannot be forced but must instead be allowed to develop. Moreover, a realistic assessment regarding the future of transatlantic cooperation is also necessary from a national standpoint. During my research, it was lamented that the EU had already missed two wake-up calls (Georgia in 2008 and Crimea in 2014) before finally reacting to the third: the February 2022 Russian invasion of Ukraine. It is therefore important that no more wake-up calls are required and that preparedness is ample; also for possibly unthinkable scenarios, such as a retreat of NATO.

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ABOUT THE AUTHOR

Clemens Binder is a Postdoc at the Centre for Military Studies, University of Copenhagen. His work deals with EU security on different levels, reaching from internal security matters to the EU's Common Security and Defence Policy. In his PhD-work at the University of Vienna, Clemens researched intersections of technologies and border security in the EU. Previously, he has worked at the Austrian Institute for International Affairs and spent research stays at Université Libre de Bruxelles and King's College London.

