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# The polycrisis and EU security and defence competences

Catherine Hoeffler <sup>a</sup>, Stéphanie C. Hofmann <sup>b</sup> and  
Frédéric Mérand <sup>c</sup>

<sup>a</sup>Global Studies Institute, Université de Genève, Suisse, Geneva; <sup>b</sup>European University Institute, Florence, Italy; <sup>c</sup>Département de science politique, Université de Montréal, Montreal, Canada

## ABSTRACT



From the 2009 sovereign debt crisis to the 2022 Russian full-scale war in Ukraine, the EU has experienced a succession of intersecting crises, or a 'polycrisis'. We examine how this polycrisis has impacted the EU's role in security and defence. While the EU's competences in security and defence have long suffered from disagreements among member states, they have shown notable developments since Brexit, and most importantly, since the 2022 war in Ukraine. We make a two-step argument to shed light on why the polycrisis has had these differentiated effects over time. The first move we make is to unpack the polycrisis to explain why and when an increase in competences may take place. We single out two crises that offer pathways for positive politicisation, leading to increased cooperation and competences: an external military threat and an internal crisis in the form of the loss of a major veto player. In a second step, we argue that the existence of an alternative organisation, NATO, helps us explain where and what cooperation can take place. Shared military threats can lead to complementary rather than substitutive empowerment at least during the duration of the crisis.

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## Introduction

From the sovereign debt debacle to successive Russian invasions of Ukraine, every crisis rattles the European Union (EU) in its own way. Some crises divide, while others unite this international organisation. A few of the many crises experienced by the EU since the 2010s led to significant European developments in the field of security and defence.<sup>1</sup> After the hopeful

**CONTACT** Catherine Hoeffler  catherine.hoeffler@unige.ch  Global Studies Institute, Université de Genève, Rue des Vieux-Grenadiers 10, 1205 Suisse, Geneva

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launch of the Common Security and Defence Policy (CSDP) in the late 1990s, the 2009 sovereign debt crisis and subsequent austerity measures put a brake on the development of military capabilities and dented the EU's security ambitions. Even the 2014 Russian invasion of Crimea did not lead to an impetus to increase CSDP competences. In the absence of a shared existential threat to the EU, divisions among member states led to what Nicoli and Zeitlin ([Forthcoming](#), see special issue introduction) call 'negative' politicisation and a politics trap.

Other crises, both internal and external, that threatened the EU's borders or even its very existence produced different impacts because they rallied political actors around security and defence, producing 'positive' politicisation. Both Brexit and the 2022 return of a major war at the border of the EU stand as illustrations of such crises that give unprecedented priority to security and defence concerns and trump other concerns such as austerity measures. The EU was able to increase its competences and enlarge its institutional structures which had long been opposed by a handful of member states. Atlanticist countries like Poland and the Netherlands cast aside their historical reluctance to a greater military role for the EU, either through CSDP or defence industrial policy. Overall, most member states reversed the impact of the sovereign debt crisis on their defence budgets, increased their defence expenditures and pledged to improve their military capabilities both on the national and EU levels. Emblematic of this reaction to an existential crisis is how in 2022, Italian Prime Minister Mario Draghi and French President Emmanuel Macron observed a 'turning point in our history'; Romanian President Klaus Iohannis spoke of a Europe that is 'more united and stronger than ever' (Morris et al., [2022](#)).

What is, then, the impact of the polycrisis on EU security and defence competences? We argue that the polycrisis needs to be unpacked, as the various crises constituting it are not necessarily equally salient to European actors. In short, some crises can trump other crises, reducing the polycleavage and politics trap (Zeitlin et al., [2019](#)). Looking at the EU's competences in security and defence, we show that external and internal crises that are perceived as existential to the EU can sideline other concerns and are more likely to generate a dynamic of positive politicisation. Other crises, such as economic downturns or humanitarian catastrophes in the region, are likely to trigger negative politicisation since they lead to distributional conflicts or geopolitical misalignments.

The focus on the composition of the polycrisis tells only part of the story. We want not only to address *whether* and *when* a polycrisis is likely or not to lead to institutional innovation and increase in competences, but also on *which* issues this is likely to occur. Why, for example, did the EU not beef up its mutual defence and solidarity clauses after 2022, but instead invested in defence industrial policy? We argue that another factor that affects how a

polycrisis impacts EU competences is the existence of organisational alternatives. The fact that the EU is not, formally or informally, the sole organisation of reference for cooperation in security and defence means that positive politicisation dynamics can play themselves out in several organisations (Alter & Meunier, 2009; Hofmann, 2009, 2013). Organisational alternatives such as NATO can (also) provide the answer to a military threat. Given the military assets that the Atlantic Alliance can mobilise and its collective defence mandate, NATO has been the organisation of choice to reinforce the Eastern flank. What the EU has and what NATO does not have is a nascent common defence industrial policy. It is therefore the EU that adopted new measures, such as the 2023 Act in Support of Ammunition Production to bolster military production. Rather than leading simply to more EU integration, the war in Ukraine seems for now to have also sharpened the division of labor between the EU and NATO. While the EU has invested and innovated more in industrial capabilities and military capacity building thanks to Brexit and the war in Ukraine, NATO has increased its attractiveness as a provider of collective defence.

### ***Polycrisis, politicisation and the EU's security and defence competences***

The EU's security and defence competences have been vulnerable to politics ever since the EU started debating them (Hofmann, 2013; Rathbun, 2004; Wagner et al., 2018). There is no *a priori* reason why politics should not persist in times of crisis or polycrisis – especially if these crises chip away at the EU and member states' budgets. In what follows, we draw on theoretical insights from International Relations, EU and crisis scholarship (Chapman & Reiter, 2004; Ferrera, Kriesi, & Schelkle, 2024; Kreuder-Sonnen, 2019; Nicoli et al., 2024; White, 2020) that lend support to our argument that we need to disentangle the polycrisis to understand how they impact EU security and defence competences. Those crises that are perceived as existential across the EU delegitimise partisan politics, putting the focus on a common fate and cohesion. They also create fertile ground for positive politicisation, as political entrepreneurs seek to pursue institutional and political innovations and integration projects (De Wilde & Zürn, 2012, p. 139; Laffan, 2024; Schmidt, 2019). Non-existential crises, by contrast, are likely to lead to negative politicisation, as they create distributional conflicts, cumulating in what Nicoli and Zeitlin label a politics trap.

In the event of positive politicisation, the kind of EU-level cooperation we are likely to observe depends to some degree on whether organisational alternatives exist (Alter & Meunier, 2009; Hofmann, 2013). In such a case, we expect that EU-level cooperation will focus on where the EU has a comparative advantage vis-à-vis the alternative organisation. In this section, we

address, first, the composition of the polycrisis and the implications for politicisation dynamics and, second, the role played by organisational alternatives.

### *The composition of a polycrisis: why and when cooperation may happen*

Whether and how individual crises impact the EU is a long-debated issue. Scholarship has pointed out that crises either further or hamper integration. Both neofunctionalist scholarship (Haas, 2004) and the ‘failing forward’ thesis (Jones et al., 2016) argue that crises trigger and further EU integration and cooperation. Hooghe and Marks (2009), on the other hand, point out that crises can lead to politicisation and hamper integration. Since this literature appeared, scholars have started paying more attention to the multiplication of crises, adding more uncertainty about crises’ productive and integrative impact (Dinan et al., 2017; Ferrara et al., 2024; van Middelaar, 2016). For example, Zeitlin et al. (2019) argue that the negative impact of crises on cooperation may not be simply due to their repetition, but because they form part of a polycrisis – a combination of distinct crises such as the euro crisis, the refugee crisis, and Brexit in the 2010s.

As far as the EU’s security and defence competences go, whether a polycrisis triggers positive or negative politicisation, or more or no integration, depends on the type of crisis. We argue that when crises are not considered as a threat to the integrity or even survival of the EU, it is likely that they lead to negative politicisation. This is so because such crises require a (costly) response in other policy domains, which must be weighed against the heavy demands of security and defence policy. Security and defence policymaking requires a sustained and high investment that plans for low-probability crisis (e.g., military attack and war). It is an expensive policy domain to set up and sustain over time. And its returns are often not very visible since the main purposes are military preparedness and territorial deterrence. When other crises hit, security and defence policy’s salience might even be intentionally downplayed and EU security and defence competences are put on the backburner of policy priorities. Hence, it is likely that at least a few countries will cut security and defence expenditures, that distributional conflicts will inform actors’ concerns, and that these actors will fight over how limited resources are invested, if at all, at the EU level. In short, attempts to further EU competences in security and defence are often prone to negative politicisation in crises other than existential ones.

Positive politicisation in the EU security and defence realm is likely to occur if the polycrisis includes an existential crisis. Existential crises question the integrity or survival of the EU (Genschel et al., 2023; Laffan, 2024). In such a situation, supranational actors manage to ‘take the high road’ and

foreground key issues to legitimise the EU's political role (Schmidt, 2019). Such a crisis can lead to 'emergency politics' and 'politics of crisis' (Cross, 2017; Kreuder-Sonnen, 2019) at least temporarily (White, 2020). Next to supra-national actors, national governments are likely to be compelled to prioritise one policy domain over others and find policy solutions rather than refuse to bargain. In security studies, scholars talk about a 'rally-around-the-flag' effect (Chapman & Reiter, 2004; Steiner et al., 2023). An existential security crisis trumps other crises and makes political cleavages less salient. As a secondary effect, we expect that existential crises are likely to trigger public support for the polity, even among usually Eurosceptic publics, and to accept the material costs that go hand-in-hand with EU security and defence cooperation (Ferrara et al., 2023; Mader et al., 2023; Nicoli et al., 2023).

These existential crises can be either internal or external. External existential crises are crises shared across the membership that question the integrity or survival of the EU. A full-scale war at the borders of the EU creates fertile ground for top-down positive politicisation (De Wilde & Zürn, 2012, p. 139; Schmidt, 2019). Politicizing actors can insist on the necessity to overcome past disagreements to act decisively. In doing so, they prioritise expedient solutions, and delegitimise 'politicking' in the name of the common cause. This leads to new institutional developments.

We expect similar dynamics when the EU experiences an internal existential crisis such as the loss of a powerful member state (von Borzyskowski & Vabulas, 2019). The loss of a member state can be considered an existential crisis: be it for symbolic and/or material reasons, such loss can question the integrity of the EU, its legitimacy and its historical trajectory (with the diffusion of scenarios about disintegration and a domino effect), or else, its material survival. In such a case, the loss of a member state can lead to – at least temporary – positive politicisation. This is especially so when the EU loses a member with significant military capabilities and expertise, whose exit can jeopardize the EU's security and defense capabilities, in particular in terms of power projection. Either way, an existential crisis can trump all other crises and empower political entrepreneurs to reignite old plans to pursue more cooperation and integration or pursue new ones.

### ***Organisational alternatives: where and what cooperation may happen***

While the first step of our argument has spelled out the scope conditions under which one crisis can trump all others – namely an existential crisis – the second part of our argument draws attention to an aspect that has not received much attention in the literature: organisational alternatives. Organisational alternatives can influence member state strategies regarding through *which* international organisation to cooperate and on *what* issues exactly (Alter & Meunier, 2009; Hofmann, 2013). We argue that

organisational alternatives shape where politicisation lead states to cooperate and on what issue.

In case of negative politicisation in the EU, cooperation might still occur in the alternative organisation. This is particularly likely if the alternative organisation is task-specific (Lenz et al., 2014). Task-specific organisations have, as the name suggests, rather narrow organisational mandates and do not engage in multipurpose activities. Other policy activities do not compete for salience and attention.

In the case of positive politicisation in the EU, organisational alternatives help us explain what kind of institutional development the EU is most likely to invest in. Two international organisations might have comparative advantages due to their organisational experiences and activities over time, their specific assets and resources or membership constellations. These advantages are likely to be reinforced in times of crises when decision-making is about speedy and efficient solution finding.

The most obvious alternative organisation to the EU's CSDP is NATO. While both organisations share some activities such as crisis management and cooperative security with third-party countries, they also have invested differently in other security and defence-related issues (Hofmann, 2013). NATO has invested in collective defence since the onset of the Cold War with its mutual defence clause encapsulated in Art. V and made operational through its integrated military command structure such as SHAPE. The EU only included a mutual assistance clause and a solidarity clause in its treaties with the Lisbon Treaty of 2007 (for a discussion on the differences and overlap between the two legal frameworks, see Perot, 2019). And while some of its member states had tried to build a bigger EU military headquarters beyond the initial small Operations Center, such plans faltered for the longest time due to veto players such as the UK. Both organisations also differ in terms of defence industrial policy. Within the EU, the European Commission has promoted an EU-centred defence industrial policy since the 2010s (Hoeffler, 2023).

## **Crises and negative politicisation**

The EU's unanimity-based decision-making on security and defence matters, coupled with lasting strategic divergences among member states, has stifled the development of an EU security and defence policy (Hofmann, 2013; Schilde et al., 2019). A series of crises – the European sovereign debt crisis and Russia's (2014) invasion of Crimea – strengthened rather than alleviated these cleavages and disagreements, leading to negative politicisation. As a result, these crises put the EU's competences on security and defence matters on the backburner and even structurally weakened the EU since defence spendings were cut. National and supranational actors, who have

been in favour of more EU security and defence competences all along, struggled to make themselves heard.

### ***The European sovereign debt crisis and its fiscal implications***

The 2009 European sovereign debt crisis presented a major challenge to EU security and defence cooperation, in particular with regard to the further development of military capabilities on the member state level. This did not have to be the case. At least in theory, the crisis could have served as an impetus for countries to pool their defence budgets and/or coordinate defence spending. However, it led to negative politicisation instead and no new EU competences in security and defence.

The sovereign debt crisis led many governments to implement austerity measures across-the-board, which often translated into significant defence budget cuts. Reductions in defence budgets varied across member states from 8 per cent to 30 per cent (EUISS, 2013, p. 12). Some countries implemented drastic cuts in very little time, as for example, 10 percent reduction in the Czech Republic, –18 percent in Greece, –17 percent in Romania and –21 percent in Latvia (Brune & Mölling, 2011). Others did not, mostly because they were not so negatively impacted by the crisis (like Sweden), because the cost-reduction reform process was already underway (France, Germany) or because they perceived a threatening security environment (Poland).

These spending cuts threatened the development of European military capabilities, especially since they were significant and uncoordinated. The Council of the EU had recognised the development of military capabilities as a necessity, stating that European military capabilities would require more ‘joint, sustained and shared efforts’ (Council of the European Union, 2008). Strategic capability shortfalls had been identified in the areas of tactical transport, air-to-air refuelling or ISTAR (intelligence, surveillance, target acquisition and reconnaissance), among others. The cuts primarily touched on crucial aspects of security and defence, namely research, technology, and development. This jeopardised European defence capabilities given the long timespan of defence development projects. The cuts were also uncoordinated; they varied from one member state to another and did not follow long-term strategic imperatives (Hoeffler & Joana, 2022).

Instead of giving more competences to the EU, member states endorsed the principle of ‘pooling and sharing’ at the 2010 European Council: the core principle of such formats resides in the voluntary cooperation of a limited number of countries agreeing to some mutualisation (e.g., in production and use) outside the EU competences, thereby aiming for economies of scale. Illustrative of such initiatives was the creation of the NORDEFECO between Denmark, Finland, Norway, and Sweden in 2009. The European Defense Agency was tasked to support such initiatives (EUISS, 2013, p. 42).



EU actors voiced their concerns and tried to coordinate these national responses to the sovereign debt crisis at the EU level. Their attempts to integrate at the EU level ignited negative politicisation and met strong political opposition from member states (Hoeffler, 2023). The European Parliament and the Commission promoted integration to tackle the challenges attached to declining budgets. The 2013 EP study 'The Cost of Non-Europe in Common Security and Defence Policy' argued that efficiency gains would be achieved with more integration of existing pooling and sharing initiatives at the EU level (Ballester, 2013). In the name of efficiency, the European Commission proposed two measures in its 2013 Communication: EU ownership of dual-use military equipment (rather than pooling and sharing), and the financial incentivisation of joint military R&D projects. Many member states rejected the idea of the EU owning military equipment. However, they agreed that the EU could support interstate cooperation on military R&D: this was considered acceptable because it did not touch upon sovereignty in military procurement, and it was of little budgetary significance. This was assured by giving the Preparatory Action on Defense Research (PADR) a budget of €90M for 2017–2019 and the later European Defense Industrial Development Programme (EDIDP) one of €500M for 2019–2020. In comparison, Horizon 2020 had a 2014–2020 budget of nearly €80bn, and Germany spent €1,55bn in military R&D in 2020 alone (Mölling & Schütz, 2021).

Overall, the sovereign debt crisis led to negative politicisation within the EU whereby member states rejected proposals that looked for EU-wide efficient solutions. Despite the political entrepreneurship of the Commission and the EP, the crisis did not lead to tangible changes in either capabilities or EU-level institution-building. European military capabilities remained in a dire state, or even worsened. Following years of 'peace dividends', budgetary problems gave a new rationale for states to cut military spending. What is more, member states cooperated less than before through the EU (European Defence Agency, 2018). Economies of scale were sought after through other channels, either mini/multilaterally or through NATO. As we will see later, the Commission would use another crisis to increase its budgetary role in the European security and defence field.

### ***Russia's invasion of Crimea***

The sovereign debt crisis was in full swing when Russia first invaded Ukraine and annexed Crimea in March 2014. Here again, the crisis could have theoretically been a catalyst for formulating a common EU policy on how to interact with Russia. Responding to Russian aggression, the EU did debate deploying a CSDP mission to Ukraine, but member states disagreed over such an activity and negative politicisation ensued (Nováky, 2015). Countries such as Poland, Sweden, the Baltics and the UK sponsored the

idea of launching a Monitoring, Mentoring and Advising CSDP mission, but the mission was opposed by Germany, France, and other Southern countries, with the argument that it could seem too aggressive towards Russia (Gros-Verheyde, 2014).

While the EU eventually sent a mission to Ukraine, its ambitions were far below what was required and did not advance EU institution-building or a common strategic position vis-à-vis Russia. The EU Advisory Mission Ukraine was launched in the summer of 2014, albeit under specific conditions. First, rather than a mutual understanding, this agreement reflected a deal between diverging coalitions pushing for a mission to Ukraine and another one to the Central African Republic (Gros-Verheyde, 2021). Second, the mission's mandate was to be limited and not encroach onto other organisations' turf (Gros-Verheyde, 2014). The mission was to be civilian, not military, as NATO was in charge of military assistance, and it should be limited to advising Ukrainian authorities on civilian security issues, without touching upon observation tasks (devoted to the OSCE) or legal reform support (done by the Commission). The mission fell short of the demands expressed by Ukrainian authorities, which had called upon the EU to send defensive lethal weapons according to the Ukrainian ambassador to the EU (Gotev, 2015).

Disagreement with the EU over how to help Ukraine and engage with Russia persisted throughout the military fighting between Ukraine and Russia and before Russia's full-scale invasion of 2022. While military skirmishes between Russia-backed forces and the Ukrainian army continued, the EU did not consider this a military threat to the continent as a whole. As a result, when in July 2021 Kyiv asked the EU to launch a CSDP mission to Ukraine, this time military, disagreements erupted again. Ukraine wanted help with the modernisation and training of Ukrainian military forces. In September 2021, six member states (Estonia, Latvia, Lithuania, Poland, Romania and Slovakia) pleaded in favour of a CSDP military training mission to Ukraine, backed by Sweden and Finland. However, other member states such as Italy, Greece and Cyprus did not want to create 'unnecessary provocations' with Moscow (Brzozowski, 2021). These disagreements stalled any EU action. It was only in February 2022 that member states started discussing military training support in Ukraine (Gros-Verheyde, 2022). Russia launched its full-scale invasion a few days later.

Overall, the EU was not able to escape negative politicisation and the politics trap in the case of the 2014 Russian aggression against Ukraine and its aftermath. Russia's annexation of Crimea was not considered a shared military threat and the EU was divided over how to relate to Russia. Consequently, they did not agree on the appropriate course of action at first, paralyzing the consensus-based CSDP apparatus. The little that the EU engaged with Ukraine after the invasion drew mainly on non-military, supranational

policy instruments provided by the Commission, that did not amount to new competences or institutional innovation in security and defence (Gehring et al., 2017). Some see this weak EU response between 2014 and 2022 as a factor leading up to the 2022 full-scale invasion.

### **Existential crises and positive politicisation**

By contrast, a shared existential crisis – either internal or external – can lead to positive politicisation. Brexit led to institutional innovations and new EU competences such as the EPF and the EDF. The 2022 Russian full-scale invasion of Ukraine increased the risk of war and the fear of a possible invasion of bordering EU member states. These crises contrast with previous crises discussed above. During Russia's partial invasion of Ukraine in 2014, the Baltic and Eastern European countries had warned Western EU member states of Russia's aggressive behaviour (European Council, 2024; Foy et al., 2024; Ruffino, 2023), but this threat perception was not shared across the EU. Since 2022, European leaders try to come up with concrete solutions to defend their member states' population, infrastructure, and territorial integrity, as well as help Ukraine. They have rearmed and increased their defence budgets: from €171bn in 2014, total defence expenditures in EU member states rose to a record of €240bn in 2022 (European Defence Agency, 2024). How long this cooperative impetus will last is at the time of writing an open question given that the war is still ongoing.

### **Brexit**

With the Brexit referendum of June 23, 2016, one of the two only military powers that can project military capabilities abroad left the EU. Fears that Brexit would usher in the fragmentation of the EU and the weakening of the EU's security and defence posture were high initially (Howorth, 2017; Martill & Sus, 2018). While it was still a member, the UK had been the EU's most powerful military and alone accounted for about a quarter of all European military expenditures (Giegerich & Mölling, 2018, pp. 7 and 8). With Brexit, the EU also lost a net contributor to its budget. Brexit complicated bilateral cooperation within Europe, most importantly with the EU's second military power, France (Pannier, 2016). Franco-British cooperation had proved crucial for EU cooperation through the 1998 Saint-Malo Declaration, and the 2010 Lancaster House Treaty. Last, the UK played a role in European defence beyond the EU's remit. It is a permanent member of the UN Security Council, as well as an active member of NATO, and for many, a bridge to Washington.

While the UK had helped to initiate the creation of CSDP at a bilateral meeting with France in Saint-Malo in 1998, it subsequently delayed and

blocked much of its institutional development. The Conservative party's strong Atlanticism (Hofmann, 2013) had successfully delayed some CSDP institutional developments, fearing their competition with NATO (Cameron, 2008). For example, the British government had disagreed with an increase in the European Defense Agency's (EDA) budget for many years. And in 2011, it vetoed the creation of an EU military headquarters (Waterfield, 2011).

So while Brexit increased existential fears of a militarily weakened EU, it also triggered a rally-around-the-flag effect, in which even member states sceptical of the EU's doings in the security and defence realm wanted to show unity and cohesion. They were helped by the fact that Brexit removed an actor that often served as a veto player on security and defence issues. Brexit became a window of opportunity for supporters of a stronger EU in security and defence (Béraud-Sudreau & Pannier, 2021). Days after the June 2016 referendum, on June 28, High Representative Federica Mogherini launched the European Union Global Strategy (EUGS), which updated the 2003 European Security Strategy. A much more political tone was added in the end (Barbé & Morillas, 2019), such that this document 'nurtures the ambition of strategic autonomy for the European Union' – the term 'strategic autonomy' had been a red flag for the UK. At the same June meeting, Angela Merkel, François Hollande and Matteo Renzi pledged to come up with proposals to boost the EU's economy and security for September. This came right after French and German foreign ministers, Jean-Marc Ayrault and Frank-Walter Steinmeier, published a joint paper entitled 'A strong Europe in a world of uncertainties', on June 24, promoting a stronger EU role in security and defence in response to Brexit (Ayrault & Steinmeier, 2016). The narratives were shared beyond the Franco-German couple. Germany and Italy called for a 'Schengen of Defense'. The concept of 'European Defense Union' also gained momentum. The 2016 German White Paper – co-signed by none other than future Commission President, then Minister of Defense Ursula van der Leyen – suggested a move from CSDP to a European Security and Defense Union (Federal Ministry of Defence, 2016), which the European Parliament took up in their November 2016 Resolution on the European Defense Union. This discourse was picked up by the European Commission, which endorsed defence as a key priority under Juncker and von der Leyen presidencies.

Institutional developments quickly followed. In 2017, member states agreed to create an EU Military Headquarters – the so-called Military Planning and Conduct Capability (MPCC) – which had been vetoed by the UK as a waste of resources and duplication with NATO's SHAPE. Another major step was the activation of the Permanent Structured Cooperation (PESCO), envisaged in the 2009 Lisbon Treaty (Martill & Sus, 2018). With PESCO activated, the EU started increasing and strengthening its military capacities through

joint projects. The introduction of the Coordinated Annual Review on Defense (CARD) in the same year aimed at streamlining national planning cycles and capacity development processes to ease cooperation. The Commission's 2017 European Defense Action Plan formally picked up on previous initiatives relative to the funding of military R&D projects and later formally launched the European Defence Fund (Haroche, 2020). Overall, all these instruments aim to incentivise cooperative capacity development and acquisition and work together. For instance, PESCO projects which applied for EDF funding would receive a bonus.

Last, member states agreed to reform their foreign policy instruments to support military assistance to their partners. This idea had been controversial among neutral countries and had been criticised by NGOs denouncing the militarisation of the EU. Initially proposed by HRVP Mogherini in 2018, the European Peace Facility (EPF) was created in 2021 through the merger of two former instruments, the Athena Mechanism and the Africa Peace Facility. An off-budget fund based on member states' contributions, the EPF circumvents EU treaties to allow for military assistance, including capacity-building, to third states.

Overall, this internal existential crisis incentivised positive politicisation of the EU's role in security and defence. Brexit nurtured the idea that Europeans should be more self-sufficient, even among the strongest NATO enthusiasts such as the Netherlands. Although they represented new competences, these developments were institutional and remained fairly modest in terms of actual resources.

### ***The 2022 Russian invasion of Ukraine***

Russia's 2022 invasion of Ukraine united EU national leaders and EU policymakers in their understanding that this constituted an external existential threat to the EU. The war produced a collective discourse on the necessity for the EU to take action. Policymakers repeatedly made the case in favour of a stronger military role for the EU. For example, at the March 11, 2022, European Council meeting in Versailles, heads of states and governments acknowledged the radical impact of the full-scale invasion and agreed to further EU defence cooperation. On October 14, 2022, in response to Putin's nuclear threats, Borrell said that the EU and its member states were ready to retaliate: 'any nuclear attack against Ukraine will create an answer – not a nuclear answer but such a powerful answer from the military side – that the Russian army will be annihilated' (Liboreiro, 2022). Borrell also observed 'Putin's war of choice is creating an existential threat to the EU' (Borrell, 2024). Another sign of a united EU front was the rewriting of the Strategic Compass. While the first draft of the Strategic Compass in November 2021 pointed to enduring disagreements among member states over the

EU's strategic priorities (Kaim & Kempin, 2022), the onset of the 2022 war in Ukraine was instrumental for member states to share a more coherent, assertive, and concrete strategic orientation (Brzozowski, 2022a). Next to these statements and texts, the radical threat that this crisis represents also prompted concrete institutional developments and an increase in competences in the EU (Fiott, 2023; Håkansson, 2024).

### *A beefed-up European peace facility*

One institutional innovation and increase in competences was the EU's rapid and massive military assistance to Ukraine through the EPF. The use and scaling-up of this instrument represents a clear change from the past, overcoming dissensus among member states regarding Ukraine and reorienting the instrument's purported use. The EPF is an intergovernmental budget instrument that works outside the framework of the EU budget. Its goal was to finance CSDP missions and operations as well as assist EU partners (through various means, among which arms transfers) since the Treaty prohibits the use of the EU budget to support operations with military or defence implications. So far, it had been used for small-scale initiatives such as in Georgia, Moldova, and Mozambique, but never for the delivery of lethal equipment, and never on such a scale. In the current context, the EPF partially finances national arms transfers to Ukraine.

Commission President Ursula von der Leyen spoke on the EU's support of Ukraine on February 24, 2022, announcing the first measures against Russia, which occurred alongside the European Council conclusions. On February 27, 2022, the Commission proposed to help finance the purchase and delivery of equipment, among which lethal weapons, to Ukraine. Such a move was departing from earlier EU practice, as emphasised publicly by von der Leyen: 'For the first time ever, the European Union will finance the purchase and delivery of weapons and other equipment to a country that is under attack. This is a watershed moment' (von der Leyen, 2022). This was confirmed by the adoption by the Council on February 28 of two assistance measures under the EPF.

Through the EPF, the EU reacted quickly and played a central role in the coordination of weapons delivery to Ukrainian armed forces. This move was described by the Director of the EU Military Staff (EUMS), Admiral Bléjean, in an interview for a specialised media outlet (Pugnet, 2022). On the very day of the Russian invasion, the EUMS put together a list of military equipment that Ukrainian forces would likely need and handed it to the HRVP. Ukrainian needs were also discussed by the military counsellor at the EU representation in Kyiv and the Ukrainian Military Staff. The EUMS made the first plan in which they suggested member states mobilize €500 m – which they agreed to in 30 hours (Pugnet, 2022). Only three countries

abstained (Austria, Ireland, and Malta, all of them neutral), but they agreed to send non-lethal equipment.

Next to its speed, the EU's response through the EPF is also notable for its scale. From 2022 to 2024, the EU spent slightly more than €6bn to support Ukraine under the EPF. The war in Ukraine led member states to increase many times the ceiling of the EPF. Initially set to €5,6bn for the 2021–2027 multiannual financial framework, the EPF financial ceiling is €17bn as of May 2024. This number was reached in early March 2024, with member states agreeing to add another €5bn to support Ukraine and to set up a new Ukraine Assistance Fund under the EPF. The capitals' agreement to make intensive use of the EPF was hailed as evidence of renewed political will in military matters.

The EU was a channel of choice for states to coordinate this support – rather than NATO, an issue to which we return later. First, the EU was able to innovate institutionally. After states started to send military equipment on their own, the need for coordination emerged since the national deliveries did not necessarily match Ukrainian needs. The EU created a clearing house cell, in which it receives an updated list of equipment needed by the Ukrainian forces every day. On this basis, the EU organised a daily meeting with EU member states and allies to coordinate who is sending what. Allies include the US, Canada, the UK (which represents the first cooperation between the EU and the UK since Brexit), Australia, New Zealand, South Korea, and Norway (EPRS, 2022). Second, through its financing role, the EU incentivised member states to act. The EPF reimbursed member states for a certain ratio of their transfers. This was considered a way to leverage support, as donations would not be a pure loss for states but could be used to modernise armed forces.

The successful use of the EPF should not be taken for granted in hindsight. Rather, it illustrates our argument about how a shared military threat helped overcome the dissensus among member states. But with the caveat that longer the crisis, the more divisions can re-emerge. The use of the EPF to financially incentivise states to transfer arms to Ukraine has not gone without difficulty. With the length of the war and the increasing demands of the Ukrainian army, the reimbursement rate has been declining. This has created tensions and dissatisfaction with the system, especially from those such as Poland, which have transferred large amounts and expected swift reimbursement (Brzozowski, 2022c). As a result, the March 2024 reform of the EPF was not easy. Given that Germany is the biggest budget contributor to the EPF, Chancellor Scholz insisted that direct donations be deduced from EPF contributions. Parallel to that, France demanded that the EPF only reimburse EU-made weapons. The shared threat scenario persists so that member states reached a compromise that allowed for continued support to Ukraine (Barigazzi, 2024).

### ***A dedicated CSDP mission in Ukraine***

Next to the transfers of weapons, member states and the HRVP started again pondering whether to launch a CSDP mission over the summer of 2022. Poland and Lithuania expressed their willingness to host and train Ukrainian troops. Member states gave the green light to the HRVP on August 30 to prepare a proposal. On October 17, 2022, the Council of the EU adopted the decision to launch the European Union Military Assistance Mission in support of Ukraine (EUMAM Ukraine), with training centres hosted by both Germany and Poland. This deployment contrasted with the Europeans' past paralysis regarding the launch of a training mission in Ukraine, which Josep Borrell lamented in his October 10, 2022 speech (Borrell, 2022).

Overall, the launch of a CSDP mission can be hailed as a further step for the EU's involvement in security and defence. Compared to the divergences that had prevented the use of CSDP for Ukraine in the past, Europeans were able to find a consensus and launch an operation. During the summer of 2022, the HRVP announced that this time, all member states were on board. Negotiations revolved around the division of labor, most importantly between Poland and German, which both had offered to host its centres, because Berlin seemed skeptical about Warsaw's tough position on Russia (Brzozowski, 2022b). Hungary resorted to the rarely-used constructive abstention clause on certain issues such as command structure and funding, thereby allowing the EU to move forward. Legally, the Treaty only allows the deployment of CSDP operations outside EU territory. The Council decision's recital 10 justifies the fact that EUMAM Ukraine operates on EU soil by the current exceptional circumstances.

### ***More EU defence-industrial policy***

Next to the urgency of supporting Ukraine, to many governments, the conflict underlined the dire state of their military. This had led them to engage in debates about how to procure more weapons in the most cost-effectively way, and, just as fundamentally, how to make sure that there *are* weapons to procure – in other words, how to get defence firms to increase their production. European capitals shared the need for more military capabilities, both to replenish stockpiles and to confront possible war scenarios. This led to major advances in the EU's competences in security and defence, which up until then had been resisted by member states: joint production and procurement of military equipment. At the Versailles meeting in March 2022, member states tasked the European Commission and HRVP to inquire into new ways to support European military capacity-building. As a response, the two published a Joint Communication on defence investment gaps in May 2022 and the Commission followed up with proposals for the EU's defence industrial policy, which echoed some of its prior, unsuccessful, policy initiatives aiming at strengthening the EU's role in security and defence.



The emergency and the potency of the crisis helped overcome the usual disagreements between opposing coalitions of member states. On the one hand, free traders and Atlanticists (Sweden, Netherlands, Poland) recognised that the EU needed to be more autonomous, thereby accepting that governments should support some EU-made military capacity-building. On the other hand, protectionists such as France had to accept that EU funds could be used for non-EU equipment, as urgent military needs could not be covered by European firms in the short term. Despite their divergences, member states could agree to build up new EU instruments to help them cooperate in joint procurement and production.

As soon as July 2022, the Commission laid out a regulation proposal for a European Defence Industry Reinforcement through Common Procurement Act (EDIRPA), designed to financially incentivise the joint purchase of weapons by member states through a €300m fund. The proposal was stuck in the Parliament for many months. A major line of disagreement pertained to what firms can be eligible for EU funds. *Contra* the initial Commission proposal and some countries' positions (France, Finland) in favour of more European autonomy in military production, a significant number of governments in the Council (such as Sweden, Poland, and Germany) and MEPs (IMCO Committee) supported opening EU funds to non-EU firms. A compromise was found based on a certain ratio of EU-made components and rules to shield European governments from the risks of relying on non-EU firms (e.g., freedom of use of equipment). EDIRPA was adopted in October 2023. Another instrument was the Act in Support of Ammunition Production (ASAP), adopted in April 2023, to increase the production of ammunitions and missiles. Through EDIRPA and ASAP, the EU has developed its competences in coordinating and financially incentivizing member states' cooperation in military production and procurement. Last, the Commission released in March 2024 its European Defence Industrial Strategy (EDIS), which lays out a plan until 2035 to enhance the EU's military readiness by supporting European defence firms, inter-alia through the promotion of European-built military capacities (European Commission & HRVP, 2024).

These instruments and EDIS have been accompanied by larger discussions pertaining to the financing of the EU's military build-up. Next to the use of Russian assets to finance aid to Ukraine, other more long-term policy options have been debated. Member states agreed to reform the bloc's fiscal rules to incentivise defence expenditures. While countries such as France and Italy had unsuccessfully lobbied in favour of it in the past, the Council was now compelled to reform the rules to balance the overall goal of debt and deficit reduction with some policy goals, such as defence expenditures in the support of strategic autonomy. Moreover, the European Investment Bank (EIB) has shifted away from its overall refusal to invest in defence firms, as a reaction to pressures from national and supranational policymakers. While it is still unclear how

far the EIB will go, this could constitute a major instrument for defence industrial policy. At this stage, Germany still opposes it, but the introduction of common debt and EU defence bonds has resurfaced on the political agenda.

Overall, the EU's competences in supporting joint military procurement and production have increased significantly since Russia's full-scale invasion of Ukraine in February 2022. The call to arms has pushed European capitals to agree with one another, and with the European Commission, on topics that up until then were considered taboo. How long this crisis will trigger cooperative effects remains to be seen, however. As of the time of writing, while European governments have not hampered major developments in EU competences, some disagreements persist. They relate for a big part to the issue of how autonomous from foreign actors should the EU strive to become in military production. Those disagreements are rooted in the fact that the EU is not the primary organisation through which states cooperate on military tasks.

### **Organisational alternatives: the EU, NATO, and their comparative advantages**

The 2022 military threat that united EU and national leaders led to considerable investments and institutional innovations in European security and defence that had long been thought unthinkable. As a result, since the Russian full-scale war in Ukraine, the EU has emerged as a more competent defence actor (Håkansson, 2024). But the EU was not the only focus of this renewed interest in cooperative security and defence efforts (Migliorati, 2024). Nor did it develop new competences or innovate institutionally in all aspects pertinent to its security and defence (Genschel et al., 2023). We argue that organisational alternatives and their comparative advantages help explain in which domains member states are likely to strengthen the EU's competences in security and defence in the event of an existential crisis. In other words, the strengthening of EU competences discussed in the previous section can only be explained in a larger institutional context that includes NATO. Focusing on the 2022 Russian invasion of Ukraine, this section contextualises the evolution of EU's competences in security and defence in the broader organisational landscape. We argue that the war has at least temporarily sharpened a division of labor between NATO and the EU: while NATO's role in collective defence has been strengthened, the EU has developed its competences in arms transfers to Ukraine, where NATO is absent, and in military capacity-building, through its defence industrial policy instruments.

### ***Collective defence: NATO as the central security provider***

In terms of collective defence, the war in Ukraine has had, so far, the effect of strengthening NATO as the incumbent security and defence organisation in

Europe.<sup>2</sup> The return of territorial war in Europe brought with it an emphasis on territorial defence and other military activities attached to traditional definitions of security. NATO Secretary-General Jens Stoltenberg deployed its rapid response force of 40,000 troops to reinforce European borders in response to war in Ukraine. Operational since 2004, this force – including land, air, maritime and special operations forces – has only previously been used to respond to natural disasters and to coordinate the departure from Afghanistan in 2021. NATO has also established four additional multinational battlegroups in Bulgaria, Hungary, Romania and Slovakia, in addition to the existing battlegroups in Estonia, Latvia, Lithuania and Poland. The eight battlegroups extend all along NATO's eastern flank, from the Baltic Sea in the north to the Black Sea in the south.

At the June 2022 NATO summit in Madrid, Allies adopted a new Strategic Concept that takes account of the new reality of European security. Article 1 of the Madrid Summit Declaration summarises the newly strengthened consensus: 'NATO remains the foundation of our collective defence and the essential forum for security considerations and decisions among Allies. Our commitment to the Washington Treaty, including Article 5, is iron-clad.' On this occasion, even French President Emmanuel Macron expressed how the war in Ukraine changed the debate about the EU's strategic autonomy: 'We are all aware of the often-heated debates in this Organisation on the competition between strengthening European strategic autonomy and the Atlantic Alliance. The facts have just shown that these debates were sometimes too passionate or at least less useful than they used to be. The reality is that Europe has taken its responsibilities in the face of war' (Macron, 2022). While EU strategic autonomy has never aimed at 'replacing' NATO in matters of collective defence, the current war has made even the French reconsider their ambition to empower the EU vis-à-vis NATO and instead the two organisations have at least temporarily found a way to back each other up and thus strengthen one another.

It was also at the 2022 Summit that NATO formally invited Sweden and Finland to join the Alliance. Soon after the 2022 Russian invasion of Ukraine, these neutral and non-aligned countries expressed their wish to become members of NATO (Beyer & Hofmann, 2011; Ejdus & Hoeffler, 2024). Their application to NATO membership reconfirmed NATO's centrality in collective defence. Finland became a member in April 2023, while Sweden joined in March 2024. Membership was in great part justified by the willingness to benefit from NATO's Article V. This testifies to the importance of NATO's comparative advantage based on its Cold War experience and institutional set-up in the form of large military headquarters such as SHAPE. In comparison, the EU's mutual defence (Article 42.7 of the Treaty on European Union) and solidarity clause (Article 222 of the Treaty of the Functioning of

the European Union) do not provide such security guarantees. Member states have not decided to extend or strengthen these clauses since 2022.

### ***Arms transfers and military capacity-building: carving out EU advantages***

In arms transfers and military capacity-building, the EU has developed more competences since 2022, something that is more complicated to organise inside NATO for political and organisational reasons. In arms transfers, the EU has strengthened its competences as illustrated by the EPF. While positive politicisation helps explain the fact that member states could overcome distributional conflict and find a compromise, we argue that at least part of the reason why the EU could carve itself such competences lies in the fact that member states agreed that NATO should not be performing such a task. NATO's sending or coordinating arms transfers to Ukraine was considered too risky, as it could trigger escalation if Russia considered it as partaking in the war alongside Ukraine.

In military capacity-building, overlap between the EU and NATO has become stronger. The overall picture is one where member states balance out NATO and EU initiatives. Historically, many member states have given preference to NATO initiatives in arms procurement (Uttley, 2018). At the time of writing, procurement still reflects this. The German-led NATO European Sky Shield Initiative provides an example: signed by 10 EU-NATO member states in October 2023, this project aims to strengthen Europeans' air and missile defence, and relies on non-EU missiles. Additionally, given the structural weaknesses of EU military equipment – not least due to the aftershocks of the sovereign debt crisis and Brexit – demands of the ongoing war have so far led member states to prioritise readily available – mostly US – equipment: 78 per cent of EU member states military acquisitions from February 2022 to June 2023 went to non-EU weapons, most importantly to the US (63 per cent of non-EU acquisitions) (European Commission & HRVP, 2024, p. 15).

However, European governments have started to invest to rebalance through the aforementioned EU defence industrial policy instruments. The EU provides member states with instruments NATO does not have, namely its economic competences to incentivise military build-up, for example, through the adaptation of fiscal rules, the complementarity between diverse instruments such as PESCO, EDF and EDIS, and access to financial resources through the EU budget, the EIB or potentially new sources of funding. For now, while promoting an EU defence industrial base, the EDIS has articulated a complementary approach to NATO on military capabilities, interoperability and cooperation on common standards.

Overall, NATO has strengthened its historical role in collective defence and the EU has increased its competences in military capacity-building

based on its defence industrial policy and financial incentives. The EU has become increasingly active and has managed to carve out and amplify its role in coordinating arms transfers and developing EU industrial policy vis-à-vis NATO.

## Conclusions

We unpacked the polycrisis and analysed the distinct impact of existential crises such as Brexit and the 2022 Russian invasion of Ukraine on the increase of EU European security and defence competences and institutions. Theoretically, we argued that whether and how EU policymakers – member states and EU elites – manage to escape the politics trap in the field of security and defence is shaped by two factors. First, politics does not play the same role in security and defence whether a crisis is perceived by policymakers as a threat to the very integrity and survival of the political community, or not. In the absence of such an existential threat, crises can exacerbate political tensions because of the high costs and strong redistributive effects of defence spending, reinforcing the politics trap at the EU level. However, when policymakers perceive a crisis to be of such gravity, security and defence issues become more salient but less polarised: policymakers give priority to cohesion, at the expense of ‘doing politics’. Second, the EU is not the primary let alone the only international organisation in the field of European security and defence. In other words, member states have organisational alternatives: they can cooperate with one another, or through another organisation – most importantly in our case, NATO. Even if member states manage to escape the politics trap, they may not necessarily empower the EU as a consequence. We expect that in times of military crises, policymakers are likelier to give primacy to the incumbent organisation, or the organisation best suited for a task, rather than debate about long-term perspectives.

Empirically, we observed that the 2009 sovereign debt crisis and the 2014 Russian annexation of Crimea had negative or no effect on the EU’s security and defence competences. Decreasing defence budgets and defence cooperation as well as the 2014 war in Ukraine showed the member states’ reluctance to cooperate through the EU. By contrast, Brexit led to institutional developments, such as the MPCC and PESCO, because it temporarily created more cohesion among the remaining EU member states and lifted the UK veto. After the 2022 Russian invasion of Ukraine, European leaders responded more decisively, and have been supported by public opinion. We have shown how and where the EU has become stronger in military terms. The EU has spent billions of euros through the EPF. It has coordinated arms transfers. However, one should not equate this ability of European policymakers to set aside their disagreements and act together with a reinforcement of the

EU in the field of security and defence at the expense of other channels. NATO has been strengthened as well.

## Notes

1. This policy domain includes competences embedded in the intergovernmental Common Security and Defense Policy as well as in supranational policies such as defence industrial policy.
2. Since Russia's illegal and illegitimate annexation of Crimea in 2014, NATO has helped to train, fund and reform Ukraine's armed forces and defence institutions. Since 2016, these efforts have been organized through a Comprehensive Assistance Package that includes a wide range of capacity-building programs and trust funds, focused in key areas like cyber defence, logistics and countering hybrid warfare. Ukrainian forces have also developed their capabilities by participating in NATO exercises and operations.

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No potential conflict of interest was reported by the author(s).

## Notes on contributors

**Catherine Hoeffler** is an Associate Professor of European Studies at the Global Studies Institute, Université de Genève.

**Stephanie C. Hofmann** is a Professor of Political Science at the European University Institute, Florence.

**Frédéric Mérand** is a Professor of Political Science at Université de Montréal.

## ORCID

**Catherine Hoeffler**  <http://orcid.org/0000-0002-5661-6715>

**Stephanie C. Hofmann**  <http://orcid.org/0000-0003-0045-8356>

**Frédéric Mérand**  <http://orcid.org/0000-0002-5168-1112>

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