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Changing patterns in CSDP in the  
aftermath of Russia's full-scale invasion of  
Ukraine in 2022

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## **Abstract**

The MA thesis explores the patterns of changes in the Common Security and Defence Policy and their main drivers after Russia's full-scale invasion of Ukraine in 2022. Considering the recent geopolitical developments, the topic is especially relevant. The literature revealed gaps in the academic literature, not least due to the topic being relatively new, but Poland was also usually disregarded when analysing several member states role in the CSDP. The study employs quantitative and qualitative research methods to analyse the statements of French, German and Polish officials after the European Council and Council of the EU meetings regarding security and defence matters. The thesis is based on collected, coded and analysed 103 statements. The research examined threat perceptions and security policy preferences of the selected member states to provide an answer to the research question – what factors caused the changes in the CSDP in the aftermath of Russia's full-scale invasion of Ukraine in 2022? The thorough analysis identified that before and after the war, there were shifts in threat perception and, subsequently in security policy preferences of the selected member states. This was reflected in the communicative discourse. This, in turn, resulted in France, Germany and Poland initiating changes in the CSDP after Russia launched a full-scale war in Ukraine. By employing Discursive Institutionalism as an analytical framework, the research concluded that the shifts in the selected member states' threat perceptions and preferences contributed to the changes in the CSDP.

**Keywords:** Common Security and Defence Policy (CSDP), Discursive Institutionalism, Strategic Compass, Strategic Autonomy, Russia's war in Ukraine, France, Germany, Poland

## **Abstrakt**

Praca magisterska bada wzorce zmian we Wspólnej Polityce Bezpieczeństwa i Obrony oraz ich główne czynniki po pełnej inwazji Rosji na Ukrainę w 2022 roku. Biorąc pod uwagę ostatnie wydarzenia geopolityczne, temat ten jest szczególnie istotny. Badania wykazują luki w literaturze akademickiej, nie tylko ze względu na to, że temat jest stosunkowo nowy, ale także dlatego, że Polska była zwykle pomijana przy analizie roli państw członkowskich w WPBiO. Studium wykorzystuje ilościowe i jakościowe metody badawcze do analizy wypowiedzi francuskich, niemieckich i polskich przedstawicieli po posiedzeniach Rady Europejskiej i Rady UE dotyczących kwestii bezpieczeństwa i obrony. W pracy zebrano, zakodowano i przeanalizowano łącznie 103 wypowiedzi. W badaniu przeanalizowano postrzeganie zagrożeń i preferencje polityki bezpieczeństwa wybranych państw członkowskich, aby odpowiedzieć na pytanie badawcze - jakie czynniki spowodowały zmiany w WPBiO w następstwie pełnej inwazji Rosji na Ukrainę w 2022 roku? Szczegółowa analiza wykazała, że przed i po wojnie nastąpiły zmiany w postrzeganiu zagrożeń, a tym samym w preferencjach wybranych państw członkowskich w zakresie polityki bezpieczeństwa. Znalazło to odzwierciedlenie w dyskursie komunikacyjnym. To z kolei spowodowało, że Francja, Niemcy i Polska zainicjowały zmiany w WPBiO po rozpoczęciu przez Rosję wojny na pełną skalę na Ukrainie. Wykorzystując instytucjonalizm dyskursywny jako ramy analityczne, badania wykazały, że zmiany w postrzeganiu zagrożeń i preferencjach wybranych państw członkowskich przyczyniły się do zmian w WPBiO.

**Słowa kluczowe:** Wspólna Polityka Bezpieczeństwa i Obrony (WPBiO), instytucjonalizm dyskursywny, kompas strategiczny, autonomia strategiczna, wojna Rosji na Ukrainie, Francja, Niemcy, Polska.

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## **List of Abbreviations**

ASEAN - The Association of Southeast Asian Nations

AUKUS - Trilateral security partnership for the Indo-Pacific region between Australia, the United Kingdom, and the United States

CARD - Coordinated Annual Review on Defence

CCDP - Civilian Capability Development Process

CFSP - Common Foreign and Security Policy

CPC - Civilian Planning and Conduct Capability

CSDP - Common Security and Defence Policy

DI – Discursive Institutionalism

EDA - European Defence Agency

EDC - European Defence Community

EDF – European Defence Fund

EDIDP - European Defence Industrial Development Programme

EDTIB - Defence Technological and Industrial Base

EDTIB - EU's Defence Technological and Industrial Base

EEAS - European External Action Service

EPF - European Peace Facility

ESDP – European Security and Defence Policy

EU – European Union

EUAM - European Union Advisory Mission

EUTM - European Union Training Mission

FIMI - Foreign Information Manipulation and Interference

IEPG - Independent European Program Group

MPCC - Military Planning and Conduct Capability

NATO – North Atlantic Treaty Organisation

OSCE - Organization for Security and Co-operation in Europe

PESCO - Permanent Structured Cooperation

TEU - Treaty on European Union

TFEU - Treaty on the Functioning of the European Union

WEAG - Western European Armaments Group

WEU - Western European Union

## Introduction

Russia's unprovoked and unjustified war in Ukraine on February 24, 2022, caused an unprecedented geopolitical shift in Europe since the Second World War. Even though Europe has experienced Russia's military aggression twice in the 21st century – the invasion of Georgia in 2008 and the annexation of Crimea and the war in Donbas in 2014, the scale of aggression and a response from international society have never been of such a large scope. The war reshaped European officials' thinking and rhetoric towards Russia and restructured their perceptions of European security and defence. On the day of the invasion, the European Council declared Russia's aggression an "illegal military action" and recognised it as a threat to European security and stability (European Council, 2022a). On February 27-28, EU Ministers of Foreign Affairs agreed to support Ukraine and even help Ukrainian armed forces through the European Peace Facility, including lethal assistance for a defensive purpose (European Council, 2022b). As the President of the European Commission, Ursula von der Leyen stated, this was a "watershed moment" because, for the first time ever, the EU financed the purchase of weapons and other equipment to a country under attack (European Commission, 2022a). Joseph Borrell, a High Representative of the EU for Foreign Affairs and Security Policy, called that time “a moment in which geopolitical Europe is being born” and called for increasing the EU’s deterrence capacity to prevent war (Brzozowski, 2022a).

Another remarkable moment was on March 11, when the leaders of EU member states adopted the Versailles Declaration, stating that "Russia's war of aggression" constituted "a tectonic shift in European history". By this declaration, the EU committed "to take more responsibility for its own security" and increase its "capacity to act autonomously" while, at the same time, recognising the importance of EU-NATO cooperation (European Council, 2022c). On March 21, the European Council approved the Strategic Compass, an ambitious policy to strengthen the EU's security and defence policy by 2030. The Compass is noteworthy as it intends to project the EU as "stronger and more capable in security and defence" by being complementary to NATO and simultaneously mentioning one of the controversial concepts – the EU's strategic autonomy (European Council, 2022d).

After almost one year of multiple packages of sanctions against Russia and financial support to Ukraine, on January 29, 2023, the EU and NATO signed the Joint Declaration on EU-NATO Cooperation, which is the third joint declaration after 2016 and 2018 (NATO, 2023). Last but not least, the restructuring of European security has been evident in the

decision of the EU member states – Denmark abandoning opt-out from European Defence and Finland and Sweden – simultaneously applying for NATO membership on May 18, 2022 (NATO et al., 2022).

Russia's war in Ukraine presented a trigger for Germany's U-turn in its foreign policy thinking. If it neglected to provide defensive weaponry to Ukraine and even stopped weapons shipments from Estonia to Ukraine until the war escalated, in a few days, Germany's Chancellor Olaf Scholz stated that "Putin's war marks a turning point (Zeitenwende) – and that goes for our foreign policy, too... What is needed to secure peace in Europe, will be done" (The Federal Government, 2022). Besides, Germany was one of the first countries to increase its defence spending to boost the country's military operational capabilities after years of hesitation: "We must invest significantly more in the security of our country in order to protect our freedom and our democracy in this way" (Brzozowski, 2022b).

France's President Emanuel Macron claimed that Europe had entered a "new era" after Russia's invasion of Ukraine, and because of Russia's "revisionist spirit", the EU needed to increase spending on its defences and energy independence (Rfi, 2022). The French Secretary of State for European Affairs, Clément Beaune, called for reducing the EU's "interdependence with the outside world, to create not an autocracy but a form of European independence", claiming that "if this is the result of this crisis, it will be a success for Europe" (Leali & Moens, 2022). During its rotating Presidency of the Council of the EU, France played a significant role in imposing harsh sanctions against Russia. This constituted a shift in France's position towards Russia, which was less hawkish and centred on negotiations before the invasion of Ukraine in 2022 (Maslanka & Dziubinska, 2022). Currently, Macron has suggested sending troops to Ukraine and, since, has not ruled it out (France 24, 2024). Moreover, he claimed he is finalising forming a coalition of military instructors (Radio Free Europe, 2024).

Russia's invasion of Ukraine surprised Poland less than many other member states, considering that Poland had been warning the EU about Russia's threat throughout the years. The Polish president called Russia's aggression "an obvious act of terror" (Radio Poland, 2022). Since February 2022, Poland has taken a lead in Europe's response to the war (Francias, 2023). Poland has been critical in supplying military equipment to Ukraine, such as tanks and ammunition, and has also played a key role in logistics to deliver arms from other countries. Excluding some disagreements over the export of agricultural goods, Poland has been one of the most vocal advocates of Ukraine. Poland has also raised alarms over Russian

aggression and promoted measures to deter Russia, both in the framework of NATO and the EU.

The war in Ukraine led the member states to rethink their defence and military strategies, including (re-)building the defence industrial base to increase military production and (re-)arming by purchasing a larger number of and more advanced military hardware. The war increased demand for US arms, such as drones, missiles, and missile defence systems, from European countries, especially Eastern Europeans (Euractiv, 2022a). For instance, In March 2022, Poland announced the urgent purchase of the US's MQ-9 Reaper unmanned aerial systems to protect itself in a deteriorated security situation in central and eastern Europe (Euractiv, 2022b).

It is evident that since the day of Russia's invasion of Ukraine, the EU and member states have devoted more emphasis to security and defence issues and rejuvenated debates over Europe's security. They have started talking about "tectonic shifts" in Europe and intensified the use of a set of words, such as EU's "capacity to act autonomously", "stronger and more capable in security and defence", "the EU as a complementary to NATO", etc. However, it is interesting that the EU has already used these concepts in recent years. Discussions had already been underway regarding the future of the EU's defence and security policy – some were favouring the EU to increase its autonomous capabilities even by creating the EU army, while others were opposing this idea in favour of transatlantic views. Therefore, it is relevant to identify the initiatives and changes in the EU's Security and Defence Policy (CSDP), which were particularly motivated by Russia's invasion of Ukraine in 2022 and then research the factors that caused the changes in the CSDP. Considering the scope of the MA thesis, it is not viable to research all 27 EU member states. Instead, the following thesis studies the changes in the CSDP based on the cases of three major EU players in the security and defence field – France, Germany and Poland. They are the member states that have the most influence on the CSDP and are the main drivers of the changes in this policy area. Due to this issue being relatively new, much research has not been done. This thesis is an attempt to fill the gaps in the literature. The research utilises mixed qualitative and quantitative methods and employs Discursive Institutionalism as an analytical framework. The study collects and analyses the statements of the selected member states' officials from June 2022 to February 2023 to track the shifts in the discourse and restructure their threat perceptions and preference formations, which, based on the assumptions of this research, contributed the changes in the CSDP Russia's full-scale invasion of Ukraine in 2022.



After the introduction, the MA thesis provides a comprehensive literature review with the aim of finding gaps and building subsequent research on the existing knowledge. It is followed by the outline of the theoretical framework. Then, the study presents a detailed methodology. The next chapter deals with overviewing and analysing the contextual background, both from the origins of the defence and security policy in the EU and more recent developments related to the CSDP. Finally, the paper provides the analysis and main findings based on the discourse analysis of the collected data, followed by the conclusion chapter.

## Contextual Background

### The EU's security and defence before the CSDP

This chapter starts with a history of the policies that preceded the CSDP. The idea of a common European defence policy can be traced back to the 1950s when European integration was in its initial stages. Jean Monnet, the General Commissioner of the French National Planning Board and one of the founders of the EU, proposed the idea of creating the European defence system on a supranational level. The idea was known as the European Defence Community (EDC), presented by French Prime Minister René Pleven, and meant establishing the European Army. The EDC project was signed by France, West Germany, Italy, Belgium, Luxembourg and the Netherlands. However, the French National Assembly refused to ratify the agreement with the argument of limiting its sovereignty. After that, in 1954, the 1948 Treaty of Brussels was adjusted in a way that included West Germany and Italy in the previously five-member club (the UK, France, Belgium, Luxembourg and the Netherlands). Treaty modification resulted in the creation of the Western European Union (WEU), another promising sign of establishing European Defence. However, during the Cold War period, because of NATO's dominance, the WEU did not manage to develop autonomous European defence. This period was more characterised by bilateral initiatives such as the Franco-German Elysée Treaty, which was agreed upon in 1963, aiming to strengthen defence-industrial cooperation and create joint missile and aircraft projects. Another bilateral initiative example was the Anglo-French SEPECAT Jaguar tactical strike aircraft (The European Defence Agency, n.d., (a)). Nevertheless, these projects lacked multilateral coordination, making it clear that it was necessary to establish common defence programmes covering all member states. Therefore, in 1976, European NATO members formed the Independent European Program Group (IEPG) to increase coordinate armaments procurement, enhance the defence technological base, balance US-European defence trade, and what is most importantly, reinforce European allies contribution to the common defence of NATO, which highlights it again that, simply, Europe's defence did not exist without NATO (The European Defence Agency, n.d., (a)). Despite the European Political Cooperation (EPC) not having a defence and military component, it was active in the process of the Conference on Security and Co-operation in Europe (CSCE). Namely, the EPC member states actively coordinated their approaches in the CSCE process, with their delegations cooperating closely during the negotiation rounds (European Communities, 1998).

The Yugoslavian crisis in 1991 revealed that Europe was far from having a coordinated defence system with full military capabilities. The crisis was held with NATO effort, particularly, the US's major contribution. The failure led the EU leaders to learn from the past mistake and decided to address this issue, amongst other matters of European integration, in 1991 in Maastricht. At the same time, the European Council agreed to include the provisions of the Common Foreign and Security Policy in the Treaty on European Union (TEU), thus making the cooperation between the EU member states in all foreign and security matters a standard procedure. The summit laid down the foundation for the "future common European defence policy which must be compatible with the NATO alliance" (EC Office of Press and Public Affairs, 1991). Additionally, the leaders of the Western European Union (WEU) issued a separate declaration, welcoming the development of the European security and defence identity and declaring the WEU's role as the EU's defence component. The WEU members in 1992 agreed to create a European Armaments Agency (EC Office of Press and Public Affairs, 1991).

By the 1992 Treaty of Maastricht, the basis of CSDP, the Common Foreign and Security Policy (CFSP), was created, which determined that the policy should frame the "Common Defence" of Europe. In 1992, the member states relocated IEPG's functions to the WEU in Bonn. In 1993, in Rome, the meeting of the WEU Council of Ministers resulted in the establishment of the Western European Armaments Group (WEAG), which would harmonise the defence requirements between all member states and bolster the technological and industrial base (The European Defence Agency, n.d., (a)). However, the Amsterdam Treaty intruded on the more significant changes regarding Europe's defence and security policy, which included the so-called Petersberg Task into the CFSP. The Petersberg Task were defined in the Petersburg Declaration adopted in June 1992 by the Ministerial Council of the WEU and included three sorts of tasks: Peacekeeping missions, humanitarian and rescue missions and tasks of combat forces in crisis management, including peace-making. The Petersburg Declaration went further than NATO's decision to undertake peacekeeping missions in accordance with CSCE or UN resolutions (Taylor, 1994, pp. 2-3). The Amsterdam Treaty integrated the WEU as a military body into the European Union (The European Defence Agency, n.d., (a)). It also established a High Representative for the CFSP and granted the European Council competence to make decisions regarding defence and security. The CFSP was an institutional and political framework that led to the creation of the European Security and Defence Policy (ESDP) (Permanent Representation of France to European Union, 2005, p.10-11).

The period between December 1998 and December 2000 is considered revolutionary for the development of the EU's security and defence policy. The St. Malo Declaration is considered a pivotal moment that paved the way for the formation of the ESDP and set the main objectives of this policy. After changing the approach, British Prime Minister Tony Blair realised the need to increase European security and defence capabilities and signed the agreement with French President Jacques Chirac. The joint statement determined that the EU member states should cooperate more in defence sectors, create common military forces to address the new security challenges, and have more capacity for autonomous action, which would enable the EU to be a significant actor in the international system. However, the declaration also stressed the importance of taking the aforementioned steps by adhering to their obligations under NATO, i.e. linking the EU security capabilities to NATO (Permanent Representation of France to European Union, 2005, p.11). This means that the UK and France reached an agreement through mutual compromise.

The motivation for the UK was clear – it was dissatisfied with the US handling of the Balkan crisis when it defined policy itself and then instructed the UK how to act; hence, the UK wanted to learn from the past failure – the EU's inability to act during the Balkan crisis due to lack of capabilities and hence had to rely heavily on the US which dictated policy. Apart from creating EU capabilities to act, the UK, via the St. Malo Declaration, also sought to increase its influence in the EU – it was not part of the Euro and Schengen areas, and, therefore, sought the establishment of stronger security and defence pillar where it could play a pivotal role. One of the reasons why France changed its position and endorsed closer EU-NATO cooperation in the defence and security policy, instead of French preference of developing autonomous EU capabilities, due to a) the pressure from the UK and Germany, b) the close links already existing and overhauling the existing system completely would require huge efforts, c) France requiring to be seen as a credible partner in developing European defence capabilities in the eyes of more Atlanticist EU member states (Gegout, 2002). One of the priorities of the German EU Presidency in 1998-1999 was strengthening the ESDP, and Germany developed its proposals largely based on the St. Malo Declaration by France and the UK. In this sense, Germany desired to bring the St. Malo Declaration plans to fruition and, to that end, suggested proposals to both – develop capacities and create relevant decision-making bodies to manage those increased capacities. The war in Kosovo was one of the main drivers for the member states to agree on measures to strengthen the ESDP. As the preferences converged, France and Germany started working together to develop military

capabilities and respective structures in the EU in cooperation with NATO (Bono, 2002, pp.29-30)

In 1999, the EU agreed to establish the ESDP's civilian arm. Next year, permanent structures were set up within the Council to handle ESDP issues and define EU defence relations with third countries and NATO. In the following years, the council expanded the ESDP's areas of responsibility – fighting against terrorism became one of the missions of the policy (Permanent Representation of France to European Union, 2005, p.11). The Nice Treaty, signed in 2001 and amended Maastricht Treaty and Treaty of Rome, brought changes to the Union's security and defence policies. Particularly incorporated the WEU's crisis management functions into the EU. Consequently, it set up new military structures: the European Union Military Committee (EUMC) and, the European Union Military Staff (EUMS), and a new political body – the Political Security Committee (PSC). In the case of the Council approval, the PSC was also granted more power to conduct crisis management operations. Based on the treaty and its annexes, the EU decided to, in accordance with Helsinki guidelines, establish 60 thousand-strong EU military force, deployable within 60 days and sustained for a minimum of one year to perform multiple tasks, such as peace-making and peace-keeping. Additionally, the EU sought to strengthen the EU's civilian capabilities in crisis management and conflict prevention, including through the creation of a 5 thousand-strong police force by 2003 and other measures regarding the rule of law, civilian administration and civil protection. Other arrangements concerned EU-NATO consultations and making it possible for the EU candidate NATO members to get involved in the EU's crisis management operations (Bono, 2002, pp. 20-21).

Scholars consider that the Nice round of the ESDP reform served the purposes of both establishing the EU as a significant military power and also to upgrade NATO. E.g., through the development of the European Rapid Reaction Force, major EU/NATO member states aimed to create military capability for the EU, strengthen the capacity of the EU and NATO to conduct so-called peace-enforcement operations, and also to connect NATO to the EU's civilian capabilities, which NATO lacked (Bono, 2002, p.3). Ties between the EU and NATO became even closer through the "Berlin Plus" agreement, which gave the EU the right to recourse to NATO collective assets and capabilities. It is worth noting that Denmark did not participate in any crisis-management operation due to its opt-out of treaty obligations on defence matters (Permanent Representation of France to European Union, 2005, p.11).

Another noteworthy date in Europe's security is December 12, 2003, when the European Council adopted the European Security Strategy (ESS). There were plenty of

meetings of EU foreign ministers before the introduction of ESS. Javier Solana, the High Representative for the Common Foreign and Security Policy, first voiced a “European strategy concept” at the European Council meeting. By adopting the Strategy, the EU, for the first time, set the principles and clear objectives for achieving the EU’s security interests based on its values. The ESS included three main parts: identifying the threats facing the EU, setting its strategic objectives and defining the policy implications for Europe (Bailes, 2005). The strategy was the main political framework for CFSP and ESDP.

In 2004, the EU established the European Defence Agency (EDA) to safeguard a well-functioning ESDP and expand European defence capabilities. The agency aimed to assist member states in defence cooperation and interoperability, such as military airworthiness, standardisation and certification, defence test and evaluation (European Defence Agency, n.d., (b)). In 2007, a component of CSDP, the Civilian Planning and Conduct Capability (CPCC), was established. It aimed to plan, deploy, conduct, and assess civilian CSDP crisis-management missions. The CPCC oversees civilian duties, including police, border assistance management, the rule of law, and security sector reform (European Union External Action, 2011).

This period also coincides with major debates about the EU integration, which also encompassed the security and defence policy. These debates culminated in the signing of the Treaty establishing a Constitution for Europe in 2004. It included some major reforms in the security and defence policy. However, the Constitutional Treaty was not ratified due to its rejection at the referendums in France and the Netherlands. The main changes envisaged in the Constitutional Treaty concerning security and defence policies were later incorporated, albeit with watered-down wordings in some cases, into the Lisbon Treaty (see below) (Whitman, 2008).

## The CSDP succeeds the ESDP

Considering that the decision-makers regarding ESDP were member-states, since the launch of ESDP, they practised a balanced approach towards institutional developments – gradually fostering and steering cooperation at the European level but at the same time preserving decision-making authority at the national level through veto power. The aforementioned institutional reforms were driven by compromising between three major approaches of the strongest member states regarding the changes. For instance, France has continuously advocated a more autonomous EU by promoting the changes for enhancing

ESDP's military dimension and decision-making capabilities. The UK also supported expanding ESDP's military capabilities, but not at the expense of decreasing NATO's key role in European defence or duplicating already existing structures. The third main perspective was supported by the Nordic countries and Germany, which focused more on the civilian dimension of ESDP, including conflict prevention and post-conflict transformation (Grevi, 2009. pp. 21-22)

After the failure of the ratification of the Constitutional Treaty, the EU leaders continued working on a new treaty that would amend existed Treaty on the European Union (TEU) and the Treaty on the Functioning of the European Union (TFEU). In 2009, the Lisbon Treaty, signed in 2007, came into force. It introduced significant amendments to ESDP provisions – most of the changes were initially proposed in the Constitutional Treaty and transferred into the Lisbon Treaty. The amendments can be categorised into two groups: structural changes and changes in decision-making and implementation policy. The scrutiny of ESDP by the European Parliament increased as it was added to the European Parliament's regular debates on the CFSP. In order to better coordinate the security policy in the Union, the Lisbon Treaty introduced the position of High Representative of the Union for Foreign Affairs and Security Policy, which serves as a Vice-President of the Commission and chairs the Foreign Affairs Council. The Treaty enabled faster access to the funds for ESDP actions and created a new fund which can be financed by member states when there is a need for urgent crisis responses and operations and it is not possible to pay them from the EU budget (Whitman, 2008).

One of the major changes to ESDP was the expansion of its aims and ambitions, such as commitments by member states to gradually strengthen their military capabilities and stay committed to NATO as the “foundation for collective defence”. It also included mutual assistance and solidarity clauses that obliged member states to assist other member states in case of armed aggression on their territory. The Lisbon Treaty also significantly expanded the Petersberg tasks' scope to include “joint disarmament operations, humanitarian and rescue tasks, military advice and assistance tasks, conflict prevention and peace-keeping tasks, tasks of combat forces in crisis management, including peace-making and post-conflict stabilisation. All these tasks may contribute to the fight against terrorism, including by supporting third countries in combating terrorism in their territories” (TEU). The treaty also introduced the European Defence Agency. Its membership was based on “opt-in” principles and joint projects were envisioned to be conducted by sub-groups of member states. One of the main changes brought by the Lisbon Treaty was the creation of a basis for Permanent

Structured Cooperation (PESCO) among member states. Also, it facilitated the establishment of the “coalitions of the able and willing” member states – which was easier to create by the decision of the Council – to undertake CSDP-related tasks in coordination with the High Representative. This was important as it provided an instrument for the willing member states to act and do so in a swifter manner when all member states were not willing to or able to participate. With the new provisions, the ESDP was renamed to CSDP and some new aspects were added to the policy. To conclude, the Lisbon Treaty was a revamp, rather than a revolution, of the existing ESDP framework (Whitman, 2008). This also meant that despite strengthening the scope of the ESDP (CSDP), the member states retained much of their competencies and sovereignty in defence matters, and national security stayed as the responsibility of the individual member states, while the EU would play a complementary, coordinating and supportive role.

In 2013, the European Council devoted its attention to strengthening cooperation in the CSDP for the first time since the Lisbon Treaty came into force. The most important initiatives included bolstering Europe’s defence industry and technological base by investing more in defence-related research, developing common standards and certification, and increasing the number of cooperative projects between member states (European Council, 2013). On June 28, 2016, High Representative Federica Mogherini presented the EU Global Strategy for the CSDP under the title “Shared Vision, Common Action: A Stronger Europe”. The strategy listed terrorism, hybrid and cyber threats, energy security, and organised crime as the main threats to the EU’s security, and the CSDP was considered the mechanism to counter them. The Strategy mentioned the concept of “strategic autonomy” several times and highlighted that Europe must maintain its capability to act independently and ensure peace and security within and beyond its borders. To this end, the document emphasised that member states should gradually move from nationally oriented defence programmes and a “voluntary approach to defence cooperation” to more cooperation and coordinated military spending plans to have “a sustainable, innovative and competitive European defence industry” and “a credible CSDP”. (European External Action Service, 2016, p .45). The 2016 Global Strategy also discussed the EU-NATO relationship. It underscored that many member states consider NATO to be the primary defence framework, and the EU should develop cooperation with NATO in a complementary manner. However, it should not compromise the decision-making autonomy, and the EU should be able to act autonomously when necessary (European External Action Service, 2016, p .20). The same approach towards the EU-NATO relation is declared in the 2016 EU-NATO Joint Declaration (NATO, 2016).



In 2016, the European Commission also presented the European Defence Action Plan that aimed at enhancing a more integrated and sufficient European defence sector. The Action Plan proposed the creation of the European Defence Fund (EDF), fostering investments in defence supply chains and reinforcing the single market for defence (European Commission, 2016, p. 5). The EDF's purpose was to promote cooperation among EU member states, optimise defence spending and procurement, and reduce duplication of their capabilities and expenditures. This Action Plan also stressed the role of a strong European Defence Technological and Industrial Base (EDTIB), push for the PESCO, and effective defence research and development, including integration of civilian research efforts (European Commission, 2016).

At the end of 2017, the European Council concluded the lengthy negotiation process on PESCO and launched it with the participation of all member states except for Denmark, Malta and the United Kingdom. Among the key initiatives and commitments, there were permanently growing defence spending, joint defence projects through the EDF, harmonising and standardising military requirements and capabilities, increasing deployability and interoperability of forces, as well as supporting the CSDP operations and missions, etc. Donald Tusk, then the President of the European Council, stated – “for many years, the strongest argument against PESCO had been the fear that it would lead to the weakening of NATO. But it is quite the opposite. Strong European defence naturally strengthens NATO. This is why PESCO is not only good news for us but also for our allies. And bad news for our enemies”. The former President of the European Commission, Jean-Claude Juncker, welcomed the decision and referred to PESCO as a Sleeping Beauty of the Lisbon Treaty. He even perceived it as the foundation for the European Union (European Commission, 2017). Juncker previously called the EU leaders to create a European army. Nevertheless, he explained that the European army project should not have strained the relations between the US and Europe but, contrarily, maintained the US-Europe partnership as the world needed their alliance (DW, 2016).

2017 was a remarkable year as Macron made a speech at Sorbonne University that became a milestone in debates about the future of the EU's security and defence architecture. He mentioned “European sovereignty” and “European autonomy” several times, as well as talked about establishing a “common intervention force, a common defence budget and a common doctrine for action”. Macron also considered PESCO a breakthrough for Europe's defence and its “autonomous operating capabilities”. However, all that was meant to complement NATO (Ouest France, 2017). The discussion about the creation of the EU army

was continued by the former German Chancellor Angela Merkel, who referred to the Juncker and stated that the “European army would show the world that there would never again be war in Europe”. She also agreed with Macron by proposing the establishment of a European intervention unit and saying that the army would not be against NATO but would be complementary. Echoing Macron’s “European autonomy”, she emphasised Europe taking its destiny into its hands and becoming “more capable to act” (Baume & Herszenhorn, 2018).

During that time, the CSDP was advancing significantly. Initially agreed, 17 collaborative defence projects were launched, another 17 new projects were agreed, and an implementation roadmap was agreed in 2018. Simultaneously, progress was made regarding the European Defence Industrial Development Programme (EDIDP) to finance defence capability projects and the Coordinated Annual Review on Defence (CARD), EDF, military mobility and civilian CSDP. The concepts of strategic autonomy and the capacity to act independently remained the most relevant topics among the EU leaders, as well as promoting the EU-NATO cooperation strengthened by another joint declaration signed in July 2018. The Council systematically reviewed the progress of security and defence cooperation and added 13 new PESCO projects covering training, maritime, air, and space capabilities in 2019. Also, the EU paid more attention to identifying and countering hybrid and cyber threats and developed guidelines to enhance resilience.

These years can be considered one of the most loaded with ideas and initiatives about the EU’s security. On November 7, 2019, Macron stated that Europe is on “the edge of a precipice”; it must start “thinking of itself strategically as geopolitical power”, and it should no longer rely on America in defence matters. He described NATO as “brain dead”, questioned whether NATO was committed to collective defence and called Europe to “wake up” to regain its “military sovereignty” (Economist, 2019). Macron’s sharp statement caused controversial reactions from different countries. Angela Merkel commented on his position and stated that Macron’s “drastic words” were unnecessary and did not align with her vision of NATO (BBC, 2019). At that time, the incoming President of the Commission, Ursula von der Leyen, indirectly addressed Macron’s position regarding NATO. As she stated, despite some “bumpiness”, NATO “has proven itself superbly as a protective shield of freedom”. In her speech, von der Leyen stressed that “Europe must also learn the language of power” if the EU aimed at asserting itself on the world stage, build its “own muscles” in security policies and “applying existing power in a more targeted way in areas where European interests are concerned” (Deutsche Welle, 2019). In January 2020, she, already the President of the Commission, discussed the importance of hard power in Europe’s security. She stated at the

World Economic Forum that Europe needs “credible military capabilities” and that they had already created some foundation for the European Defence Union. As she stressed, “it is complementary to NATO, and it is different” (Brown & Herszenhorn, 2020). Heiko Maas, then German Foreign Minister, voiced the same position, calling for the “ construction of a European security and defence union as a strong, European pillar of NATO ” (Deutsche Welle, 2020).

However, the positions regarding more European cooperation in the European defence industry were not aligned among the major military powers in the EU. For instance, at the beginning of 2020, Poland purchased US-made F-35 fighter jets instead of buying them from the European market, whereas France favours purchasing arms from European defence companies (Brzozowski, 2020a). On this matter, Annegret Kramp-Karrenbauer, then Germany’s defence minister, also favoured European military projects, such as initiatives of building the fighter and other types of aircraft, drones, cruise missiles, satellites, a new battle tank, etc., with France and Germany spearheading the projects but opening it up for other member states. The minister claimed that the overarching objectives of these projects should have been to consolidate the European defence industry. However, she highlighted that all states should have been involved in achieving this, which was “not the case everywhere at the moment” (Brzozowski, 2020b). Subsequently, in 2021, France, Germany and Spain reached a deal to develop a new generation of fighter jets and unmanned aircraft, the largest defence project in the EU, worth EUR 100 billion (Euractiv, 2021a).

Among other initiatives, Macron proposed that EU member states should get involved in “an international agenda of arms control” with common positions. This initiative was a part of his more general idea about “European strategic autonomy” and developing a common “European strategic culture”, which was not shared by more Atlanticist member states, such as Poland and the Baltic countries. Alongside this, Macron, in his post-Brexit nuclear weapon strategy, also proposed a French nuclear deterrence strategy to “take into account the interests of other European countries”. In other words, he suggested that the French nuclear umbrella covers the whole EU as France was the sole nuclear power in the EU after Brexit. This initiative received mixed reactions from Germany – A senior member of the CDU, then ruling party, shared the idea of creating the European nuclear deterrence capability, including Germany’s cooperation with France regarding nuclear weapons (Brzozowski, 2020c), whereas Kramp-Karrenbauer voiced preference towards sticking with already existing NATO’s nuclear umbrella and downplayed the idea of German cooperation with France in nuclear arms (Brzozowski, 2020b). On the same matter, there was another divergence in

opinion later this year. Emanuel Macron responded to German Defence Minister Annegret Kramp-Karrenbauer's earlier comment that, in the short term, Europe was to remain dependent on the US military protection. He claimed that despite Biden's new, more Atlanticist administration, Europe still needed its own defence strategy and a sovereign capability to act (Euractiv, 2020). In response, Kramp-Karrenbauer reiterated that "without America's nuclear and conventional capabilities, Germany and Europe cannot protect themselves". Nevertheless, she clarified that this was only a short-term view, and in the long run, Europe should have stepped up as the US's equal partner in defence by increasing defence spending. Contrary to Macron's vision, she argued that the concept of "strategic autonomy" would be unrealistic if it envisaged the EU's security, stability and prosperity without NATO and the US. Additionally, she claimed that the idea of a European army was only "one vision among many" (Lawton, 2020).

During that time, the Commission proposed a budget for 2021-2027 that could potentially end up with zero funding for one of the PESCO's flagship projects - Europe's military mobility. The proposal was instantly denounced by France, the most vocal supporter of the increase in funding for the CSDP (Brzozowski, 2020d) and Eastern European and Baltic countries. They mentioned the project as a "flagship initiative for NATO-EU cooperation" and called the Commission "to restore the commitment" to the programme as it was essential to quickly move troops and military equipment across EU Eastern Borders in case of Russia's aggression (Brzozowski, 2020e). As it seemed, the proposed financial cuts considered the concerns of Southern European countries while ignoring the interest of Eastern European member states (Brzozowski, 2020d). Notably, the COVID-19 crisis interfered in every area, including security and defence. However, the EU's High Representative Joseph Borrel called on the member states not to cut defence spending despite financial difficulties because of the deteriorating security environment (Brzozowski, 2020f). Eventually, the negotiations did not result in the Commission not cutting military mobility from the MFF. However, the finances for the EDF decreased by 39%, the EPF by 46%, and military mobility by 74% (Novaky, 2020). The pandemic also brought with it some new initiatives for the CSDP. For instance, during the EU Council Presidency, Germany proposed forming a new joint military project under PESCO for medical evacuation operations (Brzozowski, 2020g).

In June 2020, the Council of the European Union agreed to launch the development of a Strategic Compass, which consists of four main elements: crisis management, resilience, capability development, and partnerships. The first step taken in this process was the first comprehensive EU threat analysis to identify the common threats and challenges for the EU

and build a common strategic culture and shared vision for EU security and defence among member states (European Parliament, 2021). Later this year, the Council defined the special conditions for third countries to participate in PESCO projects in an exceptional way. That initiative aimed a higher level of defence cooperation with partners in the EU framework (European Council, n.d.). Subsequently, in May 2021, the US, Norway and Canada joined the military mobility groups (Brzozowski, 2021a), and the UK followed suit in 2022 (Gallardo, 2022). Also, the Council adopted guidelines for EDA's work in 2021 to enhance the "EU's strategic autonomy and its capacity to act as a security provider", including but not limited to assisting member states with their work on the Strategic Compass, supporting the implementation of the Capability Development Priorities and Strategic Context Cases, prioritising PESCO projects, military mobility and other cooperative programmes under the EDF, contributing to EU-NATO cooperation with preventing capability and effort duplication, etc. (Council of the European Union, 2020).

In November 2020, the EDA published the first complete CARD report that overviewed the EU defence landscape, including the assessment of member states' (excluding Denmark due to its opt-out of EU defence initiatives) defence spending, planning, cooperation, and capability development efforts, including the military and operational aspects of the CSDP and the competitiveness of the EDTIB (European Defence Agency, 2020). The head of the EDA stated that the main finding of the report was that "capability development is fragmented, there is a lot of duplication due to individual national approaches, and that due to this fragmentation and duplication, we are losing efficiency and interoperability", which was especially noteworthy during deteriorating strategic environment in the EU's neighbourhood. He argued that European defence integration issues lacked sufficient attention because COVID-19 consumed much political bandwidth. While commenting on the CARD report, Borrel also suggested that "European defence suffers from fragmentation, duplication and insufficient operational engagement" (Brzozowski, 2020h). The second CARD report also had similar recommendations. However, by then, the context had changed – after Russia's full-scale invasion of Ukraine in 2022, member states decided to significantly increase their military budgets, including purchasing new military hardware. The estimate puts the EU member state's combined military budgets to be around EUR 70 billion by 2025. On this background, the EDA suggested that lack of cooperation in arms procurement and purchases from non-EU suppliers constituted a serious challenge (Brzozowski, 2022c).

At the beginning of 2021, the EU leader held another debate on the CSDP. The readout of the council meeting emphasised the member state's commitment to "increase the EU's capacity to act autonomously" and the "need for the EU to take more responsibility for its security". To this end, the leaders agreed on increasing the EU's civilian and military engagement, promoting better use of the CARD and full use of PESCO among member states, enhancing EDTIB, including through the EDF, improving military mobility across the EU, access to space, cyberspace and the high seas. Nevertheless, the readout also reflected the preferences of rather Atlanticist member states as it stressed the commitment to close cooperation with NATO and partnership with the new US administration on a transatlantic agenda (European Council & Council of the European Union, 2021).

In March 2021, the Council adopted another mechanism to strengthen security and defence capabilities – the European Peace Facility (EPF), which aims to prevent conflicts, build and preserve peace, and enhance international security and stability. The EPF replaced the ATHENA mechanism, which had funded the CSDP military missions and operations since 2004. The EPF mechanism includes missions, operations and assistance to partner countries and organisations through military and defence-related equipment, infrastructure and technical support. The EPF is financed outside the EU budget, and it is an instrument that is envisaged to finance all military and defence actions under the CFSP and fund the common costs of the military CSDP missions and operations (European Council & Council of the European Union, n.d. (b)).

On March 29, 2021, the European Parliament approved EUR 7.9 billion European Defence Fund (EDF) for the first-ever programme aimed at joint military research. The project envisaged bolstering Europe's defence industry and reducing unnecessary duplication in member states' defence expenditures on defence research. The programme aimed to fund the development of new weapon prototypes if member states later purchased them (Brozowski, 2021). Another major initiative in 2021 concerned the creation of a rapid-response military force of 5,000 soldiers. The idea was proposed by 14 member states, including France and Germany but excluding Poland at the initial stage (Euractiv, 2021b). The chaotic withdrawal from Afghanistan further reinforced the momentum of this initiative. As Joseph Borrel stated, "Afghanistan has shown that the deficiencies come with a prize. (...) And sometimes there are events that catalyse history, that create a breakthrough, and I think that Afghanistan is one of these cases" (Brzozowski, 2021c). Von der Leyen also considered Afghanistan some kind of turning point for revising the European defence policy. Particularly, she suggested "stepping up to the next level" and creating a "European Defence Union" on

the basis of the existing “European defence ecosystem”. Apart from arguing in favour of increasing the EU’s defence capabilities, she also defended the necessity of strong cooperation with NATO (Brzozowski, 2021d).

The debates over the EU’s security architecture continued later this year with two main ideas: act autonomously and/or strengthen the partnership with NATO. Macron’s position remained at maintaining partnerships with “historical partners and allies” but also pursuing “its independence and sovereignty”. Some member states criticised his approach due to the unclarity of the concept of “strategic autonomy” and “European sovereignty”, while others, particularly the Eastern and Northern Europeans, were concerned that Macron would go too far in trying to distance the EU from the US (Brzozowski, 2021e). This was evident in Latvia calling for permanent US troops to deter threats stemming from Russia (Euractiv, 2021c).

After tracking the CSDP developments until the end of 2021, several underlying factors motivating the policy changes can be observed. The idea of developing an autonomous defence system in the EU, with the project of the European army being the most extreme, was prevalent in the 2010s. This idea has its roots in the 20<sup>th</sup> century and has become relevant from time to time since. This time, one of the main reasons for its actualisation was Russia’s annexation of Ukraine and the military aggression in Donbas, especially because the subsequent sanctions could not deter Russia. The second factor was the Trump administration’s approach towards European security and NATO. He voiced with critical and sharp rhetoric that the European countries should have increased their defence budgets and be responsible for their own security. Trump also undermined the Atlanticist approach, and consequently, some EU member states lost trust in the US as the security guarantor. The migration crisis at the southern European border and the threat of terrorism also played a role in the reactualisation of the EU army topic. Another influencing factor was Brexit – by the UK leaving the bloc, the EU was about to lose the member state with the strongest military and intelligence capabilities. Moreover, the UK was the country opposing more integration in the EU. Therefore, after Brexit, the EU could accelerate its integration. In the following years, circumstances influencing the trajectory of the CSDP somewhat changed. One of the major events was the chaotic withdrawal of the Allied forces from Afghanistan. Some of the European members of NATO initially did not support the withdrawal, especially with the US plan. However, the EU countries were not able to continue their operations without the US due to a lack of capabilities. Therefore, they were forced to follow the US and leave Afghanistan chaotically. This failure laid bare the EU’s weaknesses and exposed the necessity

of creating independent capabilities. This case was one of the primary incentives for the establishment of rapid deployment forces. The security situation on the EU's eastern flank further deteriorated. In 2021, Russia mobilised a massive army near Ukraine's border twice while the EU was losing Belarus: The EU had to sanction Belarus after a rigged presidential election and a crackdown on protests; Belarus hijacked a Ryanair plane with fighter jets to arrest a Belarusian journalist and utilised migrants as part of hybrid warfare against the EU member states. The EU was unable to make a difference during the war in the Eastern Partnership region, namely between Armenia and Azerbaijan. AUKUS security deal between the US, the UK and Australia was another major trigger. The agreement left France irritated because it damaged both France's military industry and positioning in the Indo-Pacific region. These factors accelerated initiatives promoting the creation of the EU's capability to act. However, considering the lack of existing resources in the EU and the worsening security environment also created incentives for strengthening EU-NATO cooperation (Lachashvili, 2022, pp. 105-111).

## The CSDP after February 24, 2022

In response to Russia's military aggression against Ukraine, on February 28, 2022, the Council approved the measure under the EPF to support Ukraine in protecting its territorial integrity and sovereignty. The assistance for the Ukrainian Armed Forces was worth EUR 500 billion for equipment and supplies, including lethal equipment, for the first time in the EU's history (European Council & Council of the European Union, 2020a).

On March 10-11, the EU heads of state/government adopted the Versailles declaration outlining the necessity for bolstering the EU's defence and security capabilities, reducing energy dependencies and building a stronger economic base. According to the meetings readouts, the "EU leaders reaffirmed their commitment to take more responsibility for the EU's own security, pursue a strategic course of action in defence and increase its capacity to act autonomously", as well as expressed their willingness to continue strong cooperation with partners in security and defence matters, including EU-NATO relations with a principle of decision-making autonomy. The EU leaders emphasised investing more in defence capabilities and innovative technologies. To achieve this, the council agreed on the following: "substantially increase defence expenditure; develop further incentives for collaborative investments in joint projects and procurement; invest in strategic enablers such as cybersecurity and space-based connectivity; foster synergies between civilian, defence and



space research and innovation; invest in critical and emerging technologies and innovation for security and defence”. Additionally, the EU leaders underlined the need to: “protect against hybrid warfare; strengthen cyber-resilience; protect critical infrastructure; fight disinformation; enhance the security and defence dimension of space industries; accelerate military mobility efforts in the EU” (European Council & Council of the European Union, 2020b).

On March 21, after two years of working on it, the Council officially approved the Strategic Compass, “a quantum leap” forward to enhance capacity and willingness to act independently. The compass set an ambitious plan for enhancing the CSDP by 2030, taking into account the Force Majeure security situation near the EU border. The council considered the Compass as the tool for increasing the EU’s strategic autonomy while strengthening partnerships with allies, particularly with NATO, to safeguard European values and interests. The Strategic Compass assessed the common threats and challenges for the EU’s security and defence environments and, based on this analysis, provided the four pillars: act, invest, partner and secure. (1) An Act pillar includes a quick response whenever a crisis emerges, and the EU should ensure establishing a robust EU Rapid Deployment Capacity of up to 5,000 troops, readiness to position 200 fully equipped CSDP mission experts within 30 days, conducting systematic live exercises on land and at sea, improving military mobility, reinforcing the civilian CSDP missions and operations by advocating a rapid and flexible decision-making process and financial solidarity, making full use of the EPF for supporting partners. (2) A Secure pillar should ensure the enhancement of the EU’s capacity to foresee, deter, and address present and rapidly emerging threats and challenges and protect the EU’s security interests. To this end, the Compass set the goal to expand its intelligence analysis capabilities, create a Hybrid Toolbox and Response Teams that combine different instruments to identify and counter hybrid threats, establish an EU Cyber Defence Policy and expand the Cyber Diplomatic Toolbox, develop a Foreign Information Manipulation and Interference Toolbox, create an EU Space Strategy for Security and Defence, bolster the EU as a maritime security actor. (3) The Invest pillar ensures the member states commit to significantly increasing their defence spending to align with the shared ambition to fill major military and civilian capabilities gaps and bolster the EDTIB. To this end, the EU will exchange national objectives on expanded and enhanced defence expenditure to meet the EU’s security demands, encourage member states to work together and collaboratively invest in strategic enablers and next-generation capabilities, increase defence technology innovation to reduce the strategic gaps and lessen reliance on other industries and technologies. (4) A Partner pillar

will ensure addressing the common threat and challenges by increasing cooperation with partners such as NATO, the UN, and regional partners such as OSCE, AU, and ASEAN; developing more specialised bilateral partnerships with like-minded states and strategic partners including the US, Canada, Norway, the UK, Japan and others; establishing tailored partnerships in other regions by fostering dialogue and promoting involvement in CSDP missions and operations (European Parliament, 2022).

Considering the fact that the Strategic Compass has been developing for two years and after the beginning of Russia's military aggression in Ukraine, the EU had only a month to make respective changes, it is crucial to distinguish what were the additions that were not on the table before the war. First of all, the Compass was more vocal about the threats coming from Russia and used stronger words while condemning its military aggression against Ukraine. The document also revealed the shift of the EU's focus towards its neighbourhood, particularly the Eastern flank, reaffirmed the responsibility to position itself as a regional security provider. There was more emphasis on boosting defence spending, including increasing member states' defence budgets and the EDF, promoting collaborative defence expenditures, such as waiving VAT for jointly developed capabilities and easing access to private funding, including from the European Investment Bank. The war also added an element of urgency to the Strategic Compass as the implementation process was agreed to start immediately, and most of them would be met by 2022 (Koenig, 2022).

Regarding the Strategic Compass, Borrell stated that it was not a response to the war in Ukraine, as they started working on it two years ago. However, it was "very timely in a moment in which every citizen in Europe can understand the purpose of a document that wants to increase the strength of the EU as a security provider". He also emphasised EU-NATO relations, saying that the Compass "is not about creating a European army", but the EU will be complimentary to NATO, which remains "the cornerstone of the territorial defence of Europe (Brzozowski, 2022d).

Denmark's decision to join the CSDP after the Danish people supported the initiative in the referendum also showcased the shifts in Europe's security environment after the 2022 Russia's invasion of Ukraine. As Prime Minister Mette Frederiksen stated, it was "a clear signal to Putin" (Euractiv, 2022c).

In June 2022, the Council adopted the conclusions on a framework for a coordinated EU response to hybrid campaigns. The Council recalled the threat stemming from Russia and underlined that it includes not only military aggression but the combination of „hybrid tactics, cyberattack, foreign information manipulation and interference, economic and energy

coercion and aggressive nuclear rhetoric“. The EU emphasised the role of CSDP missions and operations in countering this and other challenges. For instance, according to the Council’s conclusions, within their mandate, CSDP missions and operations can monitor hybrid threats and conduct exercises and training as preventive measures to counter those types of threats (European Council & Council of the European Union, 2022c).

Speaking of the CSDP missions, on October 10, 2022, the Council for Foreign Affairs ministers decided on the establishment of an EU Military Assistance Mission for Ukrainian forces (EUMAM) (Brzozowski, 2022e). This initiative is interesting as none of the civilian or military missions have been launched in the EU’s territory before, while EUMAM may take place in many locations on the member states’ territory (Melzer, 2022).

During the following months, the EU leaders discussed the defence investments and defence capabilities. Mainly, member states’ joint procurement was on the agenda due to the urgent need to continue supporting Ukraine and other key partners (European Council & Council of the European Union, 2022d). As a result, on December 1, 2022, the Council reached a general approach of committing EUR 500 million from the EU to boost joint procurement by at least three member states. Also, as agreed, at least 70% of the components of the joint procurement should originate in the EU and its associated countries. The general approach also defined the clear conditions for eligible contractors, sub-contractors and defence products to bolster the EDTIB’s competitiveness (European Council & Council of the European Union, 2022e).

In December 2022, the Council highlighted the importance of civilian CSDP missions, especially in light of the geopolitical shifts and Russia’s war against Ukraine and approved conclusions regarding a new Civilian CSDP Compact, planned to be adopted by mid-2023 (European Council & Council of the European Union, 2022f). The EU leaders once again called for the adoption of the European Defence Industry Reinforcement through the Common Procurement Act, an instrument designed to meet the most pressing and critical needs for defence products; a step up in the coordination and facilitation of joint procurement, including stock replenishment in light of support to Ukraine; a fast-tracked proposal for a European Defence Investment Programme; further acceleration of the military mobility infrastructure projects’ implementation; investment in strategic enablers including cybersecurity, space-based connectivity and resilience of critical infrastructure; robust cyber defence policy; the swift deployment of the EU’s hybrid toolbox to bolster its capacity to combat hybrid threats and campaigns; the reinforcement of civilian CSDP missions (European Council & Council of the European Union, 2022g).

On January 10, 2023, the EU and NATO signed another joint declaration strongly condemning Russia's aggression against Ukraine and reaffirming the shared vision of their collaboration in countering common security threats. The declaration underscored the significance of the EU Strategic Compass and the NATO Strategic Concept as they present the critical instruments for Euro-Atlantic security and stability (European Council & Council of the European Union, 2023a). As the President of the European Council, Charles Michel, stated, "This whole notion of autonomy, of independence, is very important in order to have more resilience going forward, and it is quite clear that this is something which needs to be done in complementarity with our friends, partners and allies". Von der Leyen also underlined that "strategic autonomy" does not exclude cooperation, contrary "you cooperate with like-minded partners" (Brzozowski, 2023). Some of the practical initiatives in the EU-NATO cooperation include the plan to protect Europe's critical infrastructure and the protection of allied territory with the European Sky Shield (Brzozowski, 2022f).

To answer the research question, it is key to identify the policy changes that were on the agenda before the war and the changes and initiatives that were directly motivated by the war. This will serve as the basis for analysing their drivers and causal links to the shift in the threat perception and preference of France, Germany, and Poland.

One of the noticeable changes in the security and defence policy of the EU after the invasion of Ukraine was providing lethal equipment worth EUR 500 million to Ukraine for the first time in the EU's history. Also, it was evident that, in general, the EU increased its emphasis on bolstering the defence and security capabilities.

One of the most evident, highly discussed, and important changes in the policy was the member states' decision to commit to the strategy of joint procurement of military equipment, including reducing costs, increasing interoperability, and supporting the development of the military-industrial base. This was showcased in the European Defence Industry Reinforcement initiative through the Common Procurement Act, an instrument designed to meet the most pressing and critical needs for defence products. This was especially relevant as the EU member states necessitated replenishing their stock, sending a large amount of weaponry from their storage to Ukraine. European Defence Investment Programme was another major initiative to support the defence industrial base and increase the production of military hardware. The war also led the EU member states to further accelerate the implementation of the military mobility infrastructure projects. Hybrid aspects were also devoted additional attention, including cybersecurity, space policy, protection of critical infrastructure, investments in emerging critical technologies and the rapid

employment of the EU's hybrid toolbox to deal with hybrid threats, including foreign information manipulation and interference and economic and energy coercion. The CSDP missions also acquired additional focus, and civilian CSDP missions were specifically reinforced. The EU has launched CSDP missions in Eastern Partnership countries, Armenia and Moldova. Furthermore, it also established the EU Military Assistance Mission for training Ukrainian forces, notably, it is the first time that the CSDP mission is conducted on the territory of the EU member states.

Also, the Strategic Compass was developed almost two years before the war. However, the invasion of Ukraine, on the one hand, accelerated the initiative already presented before the war and, on the other hand, made more vocal remarks about Russia as a security threat to the Union and paid more attention to the EU's neighbourhood, especially the Eastern flank. The compass underlines the EU's vision to be stronger and more capable in the field of security and defence. However, regarding the increased hostile security environment on the continent, it considers that the EU cannot fulfil its goals without a strong transatlantic partnership and EU-NATO relationship. Taking into account the indicated development in the CSDP, it is legitimate to say that the war caused two types of shifts in the policy: first, it added an element of urgency, and second, it led to the institutional and implementing changes, too.

## Literature Review

The literature review section will critically overview the existing works concerning the CSDP, focusing on explaining the policy changes throughout the years and evaluating the role and positions of the selected member states in this process. Various types of literature, such as books, academic articles, policy and position papers, and reports, will be reviewed. The chapter will be organised as follows: it will start by discussing the literature on the CSDP and the related issues before 2022 Russia's invasion of Ukraine; then it will focus on the sources regarding the CSDP developments after the invasion; after that, the chapter will cover two more specific but highly relevant aspects for this MA thesis – the literature concerning the threat perception and preferences of France, Germany and Poland regarding the CSDP throughout the years, and the literature analysing the CSDP through different theoretical frameworks; finally, the chapter will conclude by summarising the existing literature to find the gaps and the topics that need to be addressed in more depth. By doing so, the thesis will ensure that it does not replicate the existing work but instead builds on and effectively uses the literature to further study the chosen topic.

### CSDP before the war in Ukraine in 2022

This subchapter will overview the literature regarding the developments in the CSDP before Russia's full-scale invasion of Ukraine in 2022. It will provide essential background and analysis of how the CSDP became what it was before Russia invaded Ukraine.

One of the main aspects of the CSDP, which was widely studied before the war period, is its lack of military capabilities. The scholars argued that the CSDP had traditionally been focused on external crisis management. However, considering the increasing security threat closer to the EU's borders (including Russia's activities in Eastern Europe and general instability in North Africa) and the blurring line between external and internal security threats, the CSDP should not have only maintained the focus on external crisis and should have revised its capabilities to face crisis on its territories. Nevertheless, the authors highlighted NATO's leading role in Europe's territorial defence and suggested that, CSDP should have played its complementary role. For instance, it might have needed to expand its area of responsibility over cyber and hybrid threats stemming from external actors, such as Russia (Biscop et al., 2015).

Some scholars not only criticised the CSDP for not having focused on internal military security issues but also considered establishing the EU's security system with the full-functioning military as a utopia. They believed that the implementation of the project was complicated by the need to make a unanimous decision on the defence policy. They assumed a more integrated organisation than the modern EU is needed to create a unified army (Gros-Verheyde, 2018). Other authors argued that creating an independent security system of the EU by forming the "EU army is impossible", but "fortunately, it is not necessary" because it cannot be justified from the standpoints of efficiency and logistics (Hasik, 2017).

Another group of authors also came to similar conclusions but based on focusing on different arguments. The article "Is There Money for a European Defence Force", published in 2018, discusses the EDA and EU Battlegroups as the main components of the EU's defence capabilities and argues that the potential to translate them into an efficient pan-European military force is very limited. The author listed several factors influencing the limitations. The author claims that the EU Battlegroups, which are designed to take part in peacekeeping and crisis management, are small in size, and their rotating nature prevents them from being sufficiently involved in full-scale military operations. Nevertheless, according to the article, a significant obstruction to the CSDP is the lack of commitments from EU member states to invest in defence finances and neutral member states which prevents their participation in European defence forces (Matthijs, 2018).

Daniel Fiott (2020) also analysed the obstacles facing the EU's ambition to position as a credible military actor and criticised the CSDP military missions for not meeting the 1999 Helsinki Headline Goal – deploying up to 60,000 personnel. The author also criticised the CSDP as it lacked the strategic analysis of the evolving military, hybrid and cyber threats from Russia or China. Accordingly, the member states did not agree on which area was more vulnerable and where, when and how to deploy the Battlegroups. Although there are initiatives like PESCO and Military Planning and Conduct Capability, the author argued that Europe's security and defence policy does not function efficiently because, again, the member states do not share the same interests and are not committed to common defence policies. Gustav Lindstrom (2020) also emphasised the areas of the CSDP which should have been improved to face new types of threats - disruptive technologies and artificial intelligence. He claimed that CSDP might have needed to expand its missions to protect critical infrastructures, counter cyber and hybrid threats, and build robust surveillance systems (Lindstrom, 2020, pp. 89–96).

## CSDP after the war in Ukraine in 2022

The following subchapter will overview the literature published after Russia's invasion of Ukraine and provide the most relevant arguments regarding the CSDP, particularly regarding the policy's readiness for the war on the European continent, changes in the CSDP and the drivers behind them, the evaluation of the new security environment in the EU after the war and whether the European security environment is stronger or weaker after the war.

The dominant argument in the literature suggests that the CSDP faced the new security challenge unprepared. Luis Simon (2022) suggests that until the full-scale invasion, CSDP was “more of a foreign policy tool than a defence policy” and lacked territorial defence capabilities as it was considered NATO's primary job (Simon, 2022, p.3). The author argues that NATO will remain the leading actor for Europe's territorial defence. However, the EU has the potential to build complementary capacities with NATO in security and defence policy, mainly through joint arms procurement, capability development and technological innovation. Another work that analyses the changes in the CSDP aftermath of the war and possible adjustments to the policy and its missions and operations concludes that even though the Strategic Compass emphasises an aggravated security environment in Europe, the actual goals of the Compass remained the same as before the war. However, the war accelerated already determined missions of the CSDP, led to a new chain of developments in the area of the CSDP, and caused shifts in the balance of influence of member states. For instance, eastern European member states gained more voice and power as in other member states' eyes their perception of a threat from Russia became more visible and valid (Zandee & Stoetman, 2023).

Continuing the argument about the war accelerated the CSDP and caused the new developments, Koenig (2022), in his policy brief, “Putin's War and the Strategic Compass - A Quantum Leap for the EU's Security and Defence Policy?” – examines the impact of Russia's 2022 invasion of Ukraine on the EU's strategic Compass and assesses whether the Compass will lead to a “quantum leap” in EU security and defence integration, which were supposed to translate into strategic autonomy. The brief outlines three fundamental changes caused by the war: (1) More Focus: Member states threat perception becomes clearer – most of them declared Russia a threat to Europe's security. The war emphasised the importance of hybrid and cyber threat analysis; (2) More Money: member states agreed in Versailles on investing more and better in defence capabilities and innovative technologies, including more



expenditure on EFP and EPF; (3) More Urgency: Russia's invasion of Ukraine amplified the sense of urgency. However, the author doubts whether there is still a considerable gap between ambition and implementation, if unanimous decision-making will impede commitment to act, if more spending will equate to better spending, and if the proposed changes lead to the strategic autonomy of the EU. Similarly, Rutigliano (2023) discusses that Russia's invasion of Ukraine was an external shock that prompted changes in the CSDP, and it triggered the "spill-over effect" phenomenon among member states. This means increased threats, crises, or competitiveness causes pressure for more integration and coordinated response.

The group of more critical articles argue that Russia's invasion of Ukraine in February 2022 exposed nothing but the EU's military dependence on the US and NATO (Ratti, 2023). Shapiro and Puglierin (2023) even argued that the war revealed not only military but economic and technological dependence on the US, reinforced it and questioned widely spread rhetoric over European strategic autonomy. The authors state that the invasion of Ukraine was a litmus test that showed the lack of cohesion between the member states and revealed that they had no capabilities to act independently against the military threats in their closest neighbourhood. Such relations between the US and the EU, according to Shapiro and Puglierin, embarked on the process of "vassalisation" that reminisced the Cold War era.

This subchapter reveals that the authors'/experts' views diverge regarding the CSDP after the war – some argue that the war exposed the unpreparedness of the EU and the CSDP for a major crisis, not least because of strategic dependencies on the US and NATO in every major field related to security and defence; while others focused on how the war affected the CSDP – one part of the literature suggests that the war accelerated already existing CSDP instruments, whereas others claim that the invasion triggered more significant reactions, such as shifts in member states' threat perceptions, leading to more integration and coordination in defence matters and generally, prioritising building the EU capabilities so that the EU would be able to act more autonomously.

## Member states-oriented research and theoretical approaches

The following subchapter will overview the literature concerning the member states' positions towards the CSDP and their general views about the EU's security and defence environment. The particular focus will be on research analysing the threat perception, strategic culture, and security preferences of France, Germany, and Poland. Also, this

subchapter will overview the literature researching the CSDP through different theoretical frameworks, including how institutionalist theories, particularly discursive institutionalism – utilised as the theoretical framework in this MA thesis – were employed to analyse the changing patterns in the CSDP.

Koenig and Walter-Franke (2017), building on the premise of the France-German cooperation being a driving force in European defence integration throughout history, argued that from 2014 to 2017, France and Germany came up with ideas to reshape the security and defence in the EU. There was a strategic convergence between France and Germany; however, there was still divergence between the two in terms of their strategic political culture and public perceptions. Namely, France was characterised by an interventionist culture and, thus, views the EU as a platform to multiply capacity and legitimise military interventions in the framework of building strategic autonomy, whereas Germany's culture dictated military restraint. Other differences also strengthened this divergence – German public attitude was more unfavourable towards military engagements, Germany required parliamentary approval for such actions, and Germany also faced military shortcomings for pursuing such policy. This mix of convergence and divergence between preferences of Germany and France had led to more cautious steps, while more ambitious plans were “still in the pipeline”.

In 2020, Maulny published an article, “No Time Like the Present: Towards a Genuine Defence Industrial Base for the CSDP”, where he suggested that the major problem regarding the security and defence policies in the EU is the lack of a single vision among EU member states about a European armaments policy, EDTIB and its relation with the CSDP. To exemplify the problem, Maulny brings the divergent national preferences of the two largest DTIBs in the EU - France and Germany- regarding EU defence integration. As he writes, France historically promotes the national and sovereign defence and security policy, of which the DTIB is integral. To illustrate that, the author writes about the French white papers and the strategic reviews that mention “strategic autonomy” significantly often, underlines France's spending on defence research and technology and highlights France's positions that the competition armaments are vital (Maulny, 2020, pp. 125-127). Although Germany also shares France's position on further European integration and agrees on the significance of the armament industry, it sees it more from an economic point of view. Also, compared to France, Germany stresses the importance of not extremally on sovereign and autonomous Europe but on defence industrial cooperation, specifically on military equipment, between Europe and NATO (Maulny, 2020, p.127).

One of the most relevant works related to this MA thesis is Delphine Deschauc-Dultard's article – *European Defence in an Interpolar Context: Explaining the Limit of French-German Contribution of European Strategic Autonomy*, published in 2022. The article sees EU military cooperation in a framework of the CSDP as a result of Franco-German military cooperation. The author utilised the concepts of legitimacy and discursive institutionalism as main theoretical frameworks. The country selection is justified by the historical solid cooperation between France and Germany in European defence affairs and their leading role in promoting the concept of strategic autonomy. Deschauc-Dultard argued that the input legitimacy (meaning the initiatives, ideas and political discourse by which France and Germany push the consensus among EU members and advancements into the CSDP) is more robust due to its similarity between France and Germany. In contrast, output legitimacy (meaning the actual effectiveness and concrete results of the decisions) is limited considering their different strategic cultures, referring to different interests, threat perception and ideas about using force. (Deschauc-Dultard, 2022, pp. 593-594; p. 600).

The article suggests that although France and Germany successfully cooperate in promoting initiatives such as PESCO, MPCC and the Strategic Compass, the concrete outcomes and military capabilities are poorly presented. The reasoning behind this is previously mentioned strategic culture: while France's understanding of strategic autonomy lies in Gaullian vision of Europe-puissance – a “full-spectrum of European military capabilities”, Germany advocates more “global spectrum” of strategic autonomy including vital civilian components and close partnership with NATO (Deschauc-Dultard', 2022, pp. 601-602). The authors conclude that although France and Germany both promote strategic autonomy, they mean different things and see the tools necessary for the European defence differently.

The article published in 2021 overviews strengthening security and defence cooperation within the EU and the power balance between the member states and the EU. To this end, the authors utilised the Intergovernmental theoretical framework, Liberal Intergovernmentalism theory and New Intergovernmentalism theory. They brought up the examples of France and Germany, claiming they played a prominent role in strengthening defence cooperation by initiating the fundamental mechanisms. The authors argued that those two countries pushed for adopting PESCO and Military Planning and Conduct Capability in 2017. Also, the article suggested that France usually prioritises more military capabilities for the EU, while Germany promotes capacity building within the PESCO framework. Nevertheless, after Brexit, they found a middle ground to strengthen European defence

integration, which was well shown by supporting PESCO and backing the EDF (Glišić et al., 2021, p.53). Considering these arguments, the authors conclude that the European Council and the Council of the European Union are the leading players in the decision-making processes regarding the CSDP and further defence integration. However, they argue that there are blurring boundaries between intergovernmentalism and supranationalism, which is visible while no one can neglect the role of the European Commission as a supranational body in forming European defence policies.

The research “International threats and support for European security and defence integration: Evidence from 25 countries” contrasted the functionalist to post-functionalist theories and found out substantial evidence supporting the functionalist theory – heightened perception of the international threat correlates with more support for European security and defence integration regardless of Europhile or Eurosceptic ideology. The authors also made some observations about the influence of Russia’s war in Ukraine on public support for the integration. They focus on how long the perception of heightened threat stemming from Russia lasts. They assume that at the initial stage of the war, there might be an increased threat of Russia and increased support for the integration, but as the crisis is not a novel anymore, the threat level also declined. Therefore, the support for the integration decreased (Mader et al., 2023).

Jankowski analysed Poland’s perspective towards the CSDP after the annexation of Crimea in 2014. He argued that Europe faced a new security environment after the annexation, which revealed the shortcomings and limitations of the policy. According to Poland’s National Security Strategy of 2014, further developments of the CSDP rely on several factors, such as further general integration within the EU, strengthening of the EU-NATO cooperation, member states’ commitment to invest in defence capabilities and finally, EU’s active role in its neighbourhood. The author points out that the troubled security environment in Eastern Europe and Ukraine created incentives for developing the CSDP, including creating a new policy instrument (Jankowski, 2015, pp.71-72).

Laura Chappel, who specialises in researching the developments of Poland’s stance towards the CSDP using the concept of strategic culture, in an article published in 2017, wrote about Poland’s transformation from a sceptical member state to a potential leader. According to the author, Polish strategic culture is formed by its negative historical experiences such as invasions, losing sovereignty, betrayal by allies and being a victim of great power politics. Considering this past, “Poland’s sovereignty is sacrosanct, and its strategic culture was formulated to ensure its independence”. It is oriented to be a reliable ally

and guides with the principle of “nothing about us without us” (Chappel, 2017, p.211). To this end, Poland prioritised cooperation within NATO and with the US as they seemed more reliable security guarantors for its challenging security needs rather than the EU. The author argues that Poland’s strategic culture remains mainly the same over time as the security policy elites institutionalise it through norms, rules and formal bodies. Nevertheless, it may be subject to change in case of shifts in the security environment (Chappel, 2017, pp.210-211)

Chappel argued that although Poland was initially sceptical towards the CSDP as it viewed it as NATO’s duplication, it gradually became more engaged in the CSDP missions and initiatives such as PESCO and EU Battlegroup. The author argued that it happened because Poland was able to upload its policy preferences to the EU’s strategic documents, i.e., Poland could not influence the EU’s European Security Strategy (ESS) in 2003. However, once it became a member state, it managed to incorporate its concerns in the 2008 ESS implementation report (Chappel, 2017, pp.214-217). The article also showcases that Poland’s interests in the CSDP further evolved in the later years. For instance, Poland attempted to coordinate the CSDP reforms with France and Germany in the framework of the Weimar Initiative during its EU Council Presidency. The author concludes that Poland’s strategic culture remains centred on its perception of regional threats and prioritises territorial defence. Russia’s military aggression in Ukraine in 2014 even strengthened this perception and reemphasised territorial defence over the CSDP’s external missions (Chappel, 2017, pp.219-222).

The overviewed literature provides a crucial analysis of the evolving preferences of the selected member states towards the CSDP. It gives a profound understanding of their strategic culture and suggests each member state's possible reactions regarding the security crisis in the EU. This subchapter also proves the expected argument that the member states might support the same policy but differently define them and divergently explain the necessity of adopting specific initiatives or policies. This position is supported by France, Germany and Poland using the concept of “strategic autonomy”, “strategic sovereignty”, or “European sovereignty”, but they mean different things. The literature discussed in this chapter provides a solid background for thoroughly analysing the collected empirical data in the following chapters. This subchapter also showcases the Intergovernmental, Institutionalist and Functionalist schools are the most relevant theories in analysing the CSDP. However, Intergovernmental and Functionalist theories focus more on generalised analysis and explanations, while the Institutionalist approach provides a better tool for more in-depth research on the shifts in the specific member states’ threat perception and security-related

preferences. Particularly, Discursive Institutionalism enables better tracking of the mentioned shifts through communications, which are usually neglected in the other two theories.

The comprehensive literature review regarding the CSDP developments throughout the years presents a solid basement for further research in this MA thesis. Some parts of the topic are already well-examined, which will benefit this research as it will build upon the existing knowledge around the issue. Nevertheless, the literature review revealed some gaps that will be addressed in the given work.

Considering the fact that the full-scale invasion of Ukraine in 2022 is a relatively new event and is still ongoing, and similarly, the debate on the CSDP reforms is not over and is still in an active phase, the peer-reviewed academic works are not presented in as many numbers as regarding the pre-war period. As mentioned above, this literature holds significant importance in analysing the changes in the CSDP and their drivers, but it is not up to date and lacks a focus on the war and its effects. Also, the studies conducted after Russia's invasion of Ukraine mainly discuss the readiness of the CSDP and the challenges facing it, the implications of the war on the CSDP and the security environment in the EU and a wider Europe. However, they are not exhaustive and/or do not constitute comprehensive research studies. They do not examine the same aspect or address the same research question as this MA thesis tries to, namely – what factors caused the changes in the CSDP in the aftermath of Russia's full-scale invasion of Ukraine in 2022? That means the factors affecting the CSDP after 2022 have not yet been well examined. Another gap in the literature concerns the selection of the member states. In particular, France, Germany and Poland mostly are not studied together even though they are the three major powers in the EU's security dimension. For instance, some articles focus only on France and Germany and neglect Poland's prominent role in the EU's security and defence issues. The recent developments and the literature review of the prior period demonstrate that Poland is indeed a significant actor in security and defence matters, which considerably influences the CSDP policy. Therefore, the following MA thesis will attempt to address this gap by analysing all three – France's, Germany's and Poland's stances towards the CSDP before and after the war. After completing the literature review, the final finding is that less attention is paid to the importance of the communication discourse of the decision-makers in shaping the positions towards the CSDP. On this note, the MA thesis will collect and analyse the statements of the heads of state/governments and foreign affairs and defence ministers, as this method lacks sufficient attention among scholars. This approach will lead to original outcomes and findings and, thus, enrich the existing literature. Henceforth, examining the transformations of the EU's

security and defence policy and its raison d'être with the most updated information, original empirical data and theoretical analysis will create additional value in this field.

# Theoretical Framework

The following MA thesis utilises Vivian A. Schmidt’s Discursive Institutionalism (DI) theory to answer the research question - what factors caused the changes in CSDP in the aftermath of Russia's full-scale invasion of Ukraine in 2022? – in a more systematic and structured manner. This chapter first explains DI and its main postulates. It then briefly touches upon the use of DI in different research and finally justifies the selection of the theory for the MA thesis.

## Overview of Discursive Institutionalism

Discursive Institutionalism focuses on the role of ideas and discourse in politics. It is one of the four theories of institutionalism that also pay particular attention to the ideas and discourse: Rational Choice Institutionalism (RI), Historical Institutionalism (HI), and Sociological Institutionalism (SI) (Schmidt, 2008, p.304). They are all known as new institutionalism theories that emerged in the mid-1980s as a response to the previously existing institutionalist theories that solely overemphasised agency but neglected the role of structure and agents of agencies. The three new institutionalist theories brought the concept of institutions back and revived its role in the theoretical framework. However, they defined institutions as static structures and agents with fixed preferences and norms. Some scholars of three new institutionalism theories tried to make institutions, norms, and preferences less fixed. By doing so, the newest new institutionalism – Discourse Institutionalism was born, which not only emphasised the role of ideas and discourse but also challenged the core premises of the older institutionalism – both ontologically (about the definition of institutions and the process of their creation, maintenance and changes) and epistemologically (“about what we can know about institutions and what makes them continue or change with regard to interests and norms” (Schmidt, 2008, p. 322).

DI is characterised by the following four things: (1) ideas and discourse are crucial, although the definitions of these concepts may be different; (2) ideas and discourse matter when they are situated within an institutional context; (3) ideas should be put into their “meaning context” while discourse follows a “logic of communication” regarding the variations in what I communicated, how and where; (4) most crucially, DI adopt a more dynamic perspective on change which ensures that ideas and discourse address more obstacles than three other institutionalism models (Schmidt, 2008, p.304).



This paragraph discusses the characteristics mentioned above in more detail. As Schmidt argues, discourse can be contextualised not only as ideas or text but in combination with context and agency – “who said what to whom...where, when, how and why?” (2008, p.305). Discursive institutionalism views institutions as both given context and as contingent. Thus, institutions are both constraining structures in which the agents operate and the constructs that actors create and change. The idea is that the institutions are not “external-rule-following structures” (Schmidt, 2008, p.304), meaning that institutions are created by agents based on their ideas, beliefs and the context in which they operate. Also, developments inside them are not the products of the agents that act based on either rational choices or norms and rules. Instead, the actions in institutions can be seen as the process undertaken by the agents considering their “background ideational abilities” and their “discursive abilities”, meaning their communication and interaction abilities, which can lead to changes in institutional structures. Background ideational abilities allow agents to make sense within a meaningful context, while “discursive abilities” determine the abilities of agents to deliberate on and persuade others to change or maintain institutions through communication. Schmidt argues that this communicative logic is why DI explains institutional changes better than the other three new institutionalisms (Schmidt, 2008, p.314).

Speaking of communicative logic, the author distinguished two forms of discourse as the interactive process of conveying ideas: coordinative and communicative discourse. Coordinative discourse happens among policy actors, such as officials, civil servants, experts, and activists, and it involves discussions about specific policies to coordinate an agreement. Conversely, communicative discourse is a discourse between political actors and the public to present, deliberate, or legitimise political ideas (Schmidt, 2008, p.309).

DI can be seen as complementary to the three other institutionalisms—rational choice, historical, and sociological; in other words, DI is a theory built on the basis of the older three institutionalisms. The author argues that they provide the institutional background of what is generally expected within institutional structures, while DI can better explain unexpected outcomes. Furthermore, Schmidt explains that so-called unexpected outcomes may be foreseeable if we analyse particular ideational rules and communicative logic within a given context (Schmidt, 2008, p.313).

This theory attempts to explain why some ideas turn into policies while others do not; Martin B. Carstensen and Vivien A. Schmidt (2016, p.320), in their article “Power through, over and in Ideas: Conceptualizing Ideational Power in Discursive Institutionalism”, argue that some ideas become policies by exercising ideational power. Ideational Power is defined

“as the capacity of actors (whether individual or collective) to influence actors’ normative and cognitive beliefs through the use of ideational elements”. There are three mechanisms for turning some ideas into policies and programmes: (1) Power through ideas refers to the situation when an actor has the ability to persuade others by presenting their policy ideas and problem solutions as the only valid options. That may happen in both coordinative discourses – among policy actors and in communicative discourse – between policy actors and the general public. These kinds of policy arguments also resonate with public narratives and sentiments that make their ideas get adopted as an appropriate policy; (2) Power over ideas refers to the actors who have the power to control which ideas can be considered as an appropriate policy, they may shame opponents into supporting their ideas or even directly hinder alternative ideas to be voiced; (3) Power in ideas refers to the situation when some ideas already have a more profound institutional background, and they are authoritative over other. That may happen because some collective memories or philosophies present specific ideas as viable and exclude others from profound consideration. In this case, actors who choose these authoritative ideas have the highest chance of turning their ideas policy ideas into actual policies (Carstensen & Schmidt, 2016, pp. 321-332).

Discursive institutionalists also consider a change to be more evolutionary. To support that argument, Schmidt cites Sheri Berman, who described how socialists slowly transformed into Social Democrats over time as they attempted to come up with fair and practical democratic solutions to deal with the economic changes caused by globalising capitalism. Another example is the work of Neta C. Crawford, who discussed how the idea of trusteeship evolved from the discourse of colonialism to today’s international institutions (Schmidt, 2008, p.316).

Raymond Boudon (2003) believes that actors not only act rationally, meaning fulfilling predefined self-interest, but they also consider a variety of reasons, such as moral, practical, and norm-based factors. This perspective perceives rationality more as a cognitive process rather than a means to an end. Most importantly, in this outlook, objective interests and ideas are non-distinguishable, meaning that what actors consider as their interests are formed by their ideas, making all interests subjective (as cited in [Schmidt, 2008, p.317]). Similarly, there are no fixed, static norms; they are always dynamic and change according to agents’ interactions (Schmidt, 2008, p.304).

## Explanatory value of Discursive Institutionalism

Discursive institutionalism is not a dominant theory. However, an increasing number of authors have recently employed it as a theoretical lens to explore the role of ideas and discourse, how they shape political institutions and how changes in discourse turn into changes in institutions and policies. Scholars have utilised this theory to research various policy areas, such as renewable energy support schemes in the European Union (Lauber & Schenner, 2011), Changes within the Common Agricultural Policy (Lynggaard, 2007), the Eurozone crisis and the European Commission's response to it (Schmidt, 2016), EU politicisation and policy-making (Wendler & Hurrelmann, 2022), lobbying concerning the EU Emissions Trading System (Fitch-Roy et al, 2019), curriculum changes in globalised context (Nordin & Sundberg, 2018), etc.

Nevertheless, the literature review showed that, although this theory is a suitable model for tracking changes in security and defence policies of the EU, it has not been employed by many academics. Among a few scholars, Antonie Rayroux and his work "Speaking EU defence at home: Contentious discourages and constructive ambiguity" are worth mentioning. He utilises DI's theoretical framework to analyse how France and Ireland construct, coordinate and communicate discourses around the CSDP at home in a way that aligns with their national preferences. The author justifies using DI as it sheds light on the agents, their ideas, and the institutional context. It also provides the model to analyse the selected countries' background ideational abilities, such as France's exceptionalism and Ireland's neutrality, and how they play roles in shaping their stances toward CSDP policies. Additionally, Rayroux underlines the importance of analysing the coordinative and communicative discourse of these two countries, as both of them face different types of challenges – France struggles in coordinative discourse because of the many actors, while Ireland has more communicative discourse-related challenges given the sensitivity of neutrality among the public. The article explores the contentious discourages and constructive ambiguity that resonates with how DI sees policies and institutions persistently interpreted and changing structures through different discourses (2024, p. 388-399). Rayroux's article demonstrates that using DI as a theoretical framework for studying the changing preferences of the member states and how that translates into initiating policy changes in the CSDP is effective and generates insightful outcomes.

## Reasons for the Selection of Discursive Institutionalism

The reasons why discursive institutionalism perfectly fits the research purposes are the following: DI is a theoretical framework that serves as a structured model for answering the research question: What factors caused the changes in CSDP in the aftermath of Russia's full-scale invasion of Ukraine in 2022? Discursive institutionalism provides a relevant framework to analyse the role of changing preferences of the selected member states (expressed through shifts in discourse) in driving changes in the EU's Common Security and Defence Policy. A central argument of DI is that ideas and discourse can lead to institutional and policy changes.

To track the changes in discourse, the paper utilises the discourse analysis of statements of the heads of state/governments and the relevant ministers given after the European Council and Council of the EU meetings from June 2020 to February 2024. DI explains how the agents of the institutions construct new ideas and new meanings of the concepts through time. Thus, it enables the examination of how the selected member states presented their ideas and preferences regarding their participation in the EU's security and defence policy before and after the war and how they justified the reasoning for their ideas regarding CSDP and provided the argumentation. Also, it is noteworthy that DI focuses not only on cognitive ideas but also on normative ideas that serve as the background context. In this case, cognitive ideas are threat perceptions and security and defence preferences, while background context is the actor's values, norms, and strategic culture. Taking into account the context in which the discourse was shared is crucial for this study.

DI is well-suited for this research as it considers the coordinative and communicative abilities of the agents. Ideally, the thesis would utilise both coordinative (among policy actors/agents) and communicative (between policy actors and the general public) discourse analysis to show how the different ideas are conveyed at multiple levels. However, there are two obstacles: the length and scope of the research do not allow for a detailed examination of the discourse among all relevant actors, such as officials, experts, civil servants, civil society and other relevant stakeholders. Critically, Council meetings are held behind closed doors, and the most important communication among the decision-makers is secret. Therefore, the thesis focuses its analysis on the communicative discourse – the statements given by the heads of state/government and the relevant ministers to the general public.

To sum up, discursive institutionalism is a theory that helps track shifts in the discourse of the member states, how shifts in the discourse translated into policy changes, and finally, determine whether the changes in CSDP translated into short-term or long-lasting policy adjustments.

## Methodology

This chapter deals with the methodology of the study. The analysis aims to identify the initiatives and changes in the CSDP, which were mainly motivated by Russia's invasion of Ukraine in 2022 and attempts to answer the research question: *What factors contributed to the changes in CSDP in the aftermath of Russia's full-scale invasion of Ukraine in 2022?* The research studies the changes in the CSDP based on the cases of France, Germany and Poland. It assumes that, before the war, there were differences in both threat perceptions and the perceived sources of threats and, accordingly, in security preferences among France, Germany and Poland. Afterwards, the thesis assumes that as a consequence of the war, the perceptions about the source of threat converged between the selected three member states; threat perceptions also converged but not at the same level, and member states' perceptions of the military threat became relatively similar, but the perception of other types of threats still diverged. The changing threat perceptions led to changes in discourse about the member states' security preferences. As the perceptions about the sources of threat and, to some extent, the types of threat converged, their security preferences also somewhat converged; namely, all three agreed that more had to be done to strengthen European security and defence. However, the preferences of how to tackle the threats are still deferred in accordance with the differences in perceived types of threats. Consequently, the selected member states had diverging initiatives and ideas for reforms of the CSDP. Where there was a higher level of convergence between the discourse of France, Germany and Poland, the initiatives and ideas of the CSDP reforms succeeded in going through. Whereas the success of initiatives on which the member states had different positions, varied.

Based on the coded and analysed statements of the heads of state/government defence and foreign affairs ministers, it was evident that Russia's full-scale invasion of Ukraine resulted in changes in their communicative discourse. Then, by analysing ideas/initiatives regarding the CSDP reforms before and after the war, it can be concluded that shifts indeed occurred in the approaches of France, Germany and Poland about the CSDP reforms. The drivers of these changes were traced into the shifts of the selected member states' threat perceptions and policy preferences. As France, Germany, and Poland are the main players in the CSDP area with the most influence, they were primarily successful in uploading their declared policy preferences to the EU level. DI also rightly predicted that the member states would also heavily focus on normative ideas – France, in line with its values, norms and strategic culture, emphasised the policies derived from the concepts of “European sovereignty” and “strategic

autonomy”, while Polish preferences primarily came from its Atlanticist strategic culture and normative ideas of deterring Russian aggression.

A systematic literature review was conducted to comprehend the existing knowledge and the theoretical approaches regarding this subject. The subsections of the literature were identified deductively, and based on the (sub-)topics, major academic works were searched using a combination of keywords and Boolean operators. Conducting the literature review was crucial for several reasons. It identified the gaps and areas which required further research. The literature review was also beneficial as it helped make methodological and research design choices and identify the best fitting theoretical framework. Particularly, the literature review revealed that the studies mainly focus on the readiness of the CSDP for the security crisis and the implications of Russia’s aggression on the CSDP but do not comprehensively examine the factors causing the shifts in the policy after the war. Also, scholars often do not research France, Germany and Poland together in the CSDP context, and the tendency shows that many authors neglect Poland’s role in the decision-making process related to the CSDP, focusing only on the role of France and Germany. Nevertheless, the pilot study showed that Poland, France and Germany are the three most influential member states in the CSDP and the main drivers of the shifts in this policy area with strong positions regarding EU policies. These three countries were selected based on their declared stances about the security and defence architecture of the EU before the war. Particularly:

- France – an opponent of Atlanticism, an initiator of the idea of the EU’s strategic autonomy, with a moderate expenditure in defence (1.92% of GDP in 2021) (O’Neill, 2024).
- Germany – a moderate Atlanticist that relied on the US for security, with a preference to invest less in defence (1.33% of GDP in 2021) (O’Neill, 2024).
- Poland – a strong Atlanticist country with a preference for diversification of security and high investment in defence and security (2.22% of GDP in 2021) (O’Neill, 2024).

Besides, the literature showed that Intergovernmental, Institutional and Functionalist theories are the most frequently used for analysing the CSDP, which means that less attention is paid to the role of the decision-makers’ political communications and discourse in institutional changes. Thus, to fill in this gap, the study utilises Computer-Assisted Content Analysis (CAQDAS) and employs Discourse Analysis (DI).

DI acknowledges the role of ideas, discourse and communication processes in shaping institutional change and policy outcomes. DI suggests that the actors do not act only rationally but also consider a variety of reasons, such as moral, practical and norm-based factors. Also, there are no fixed, objective interests; they are always dynamic and change according to agents' interactions. In this study, DI serves as a suitable theoretical framework to answer the research question in several ways. For instance, DI helps in understanding the “background ideational abilities” of France, Germany and Poland, which will provide necessary information about their norm evolution and strategic culture – what are their positions regarding the use of force and military intervention in the crisis. Next, DI will assist in examining security-related policy framing by the selected member states over time. As the thesis assumes that threat perception and preference formations are drivers of the changes in the CSDP, DI will help explain how the countries framed security threats before the war and how they changed after the invasion. Then it will provide important information about what issues become securitised through discourse after the war and how it affects France’s, Germany’s and Poland’s initiatives regarding the changes in the CSDP. DI also examines the power in ideas when some ideas are presented to be more important as they are built on collective memories. It will be interesting to see whether France, Germany and Poland utilise “power in ideas” to push their ideas regarding security and defence matters of the EU.

CAQDAS allows a systematic and in-depth analysis of textual data, such as official statements and policy documents. It also enables the researcher to code large volumes of data and identify recurring concepts and patterns. In this thesis, CAQDAS is utilised to analyse the statements of French, German and Polish officials both quantitatively (count the frequencies of the codes) and qualitatively. The detailed steps and reason for using this method will be provided in the following sub-chapter.

## Data Collection

The research examines the changes in the CSDP, as it is a cooperation framework between the EU Member States which includes most of the policy areas relevant to the security and defence of the EU. The timeframe of the research starts from June 2020 to February 2023. The study explores the CSDP changes after Russia's invasion of Ukraine in 2022 and the factors leading to these changes. However, it is necessary to examine the recent periods to track the changes in the policy and the proposed leading factors. Therefore, instead of 2022, 2020 has been selected as a starting point. In June 2020, the European Council



invited the High Representative and the European Commission to present a proposal for a Strategic Compass in early 2022. The Strategic Compass was conceived as a strategy to outline aspirations and concrete goals for the EU's security and defence policy by 2030. To provide a detailed conceptual background, the study tracks the section “Timeline: EU Cooperation on Security and Defence” published on the official website of the Council of the EU and the European Council. For the relevant news updates, it mainly relies on an online newspaper, Euractiv’s section – “Defence and Security Archive”.

The thesis aimed to reconstruct the preferences and the perception of threats in the selected member states and examine the changes in the discourse. To this end, the units of analysis are the statements of the selected member states’ officials. Particularly the statements of the heads of state/governments and the relevant ministers given after the European Council and Council of the EU meetings from June 2020 to February 2024. Since the mentioned meetings are held behind closed doors, and the most important communication among the decision-makers is secret, analysing the officials' statements is the best method to research their positions regarding the security and defence issues in the EU.

The codes and subcodes are developed based on the literature review and the overview of the contextual background information. It was evident in the literature review that member states threat perceptions (e.g. Balkan crisis, annexation of Crimea, etc.) and security preferences played major roles in shaping the CSDP reforms throughout the EU integration process. The codebook includes several categories of codes to capture the diverse preferences of the selected member states regarding security and defence policies, particularly cooperation in the CSDP. The codes are operationalised as follows:

- Threat mentioned – this code is used when a statement contains an indication of potential hostile action that could cause harm and/or damage to the EU and/or the member state, and their interests from some source of threat (see below). Several types of threats are separated out as sub-codes:
  - Military threat (including terrorism) – refers to the threat that stems from the potential danger of hostile action using military means; this code also involves terrorism as terrorist acts are usually also perpetrated by military means.
  - Hybrid threat (including disinformation, cyberattacks, migration) – refers to the threat that stems from potential hostile action using no-military means, such as disinformation and propaganda campaigns, cyberattacks, instrumentalising migration to create an artificial migration crisis in the target actor, etc.

- Threats to economic and energy security – refers to the threats from the hostile actor that uses economic and energy supply tools as leverages for coercion and/or to cause harm to the targeted actors.
- Other – refers to all other types of threats that do not fall into the categories of threats related to military, hybrid or economic and energy security.
- Source of threat – the actor from which the above-mentioned threats originate, i.e. who the EU and its member states view as potentially risky actors that might cause harm to the EU and/or the member states and their interest. Based on the contextual background and literature review, two countries that are most frequently considered a potential source of threat to the EU and/or its member states are separated out, while all other actors fall into the "other" category:
  - Russia
  - China
  - Other
- Member states' security preferences on coordination explicitly mentioned – this code is used when the member states' officials indicate the positions/preferences of their respective countries concerning security and security threats and the ways of tackling them, especially in coordination with other actors (states, organisations). Based on the literature review and contextual background, and in line with the thesis' assumptions, three dominant security preferences on coordination are:
  - More cooperation between the EU and NATO and/or the US – this indicates that member states' officials explicitly mention increased cooperation between the EU and NATO and/or the US as their security preference to deal with the aforementioned threats. Three sub-types of EU-NATO/US cooperation are separated out:
    - Strengthening NATO's Eastern flank – this indicates member states' preference to strengthen the security of the Eastern flank (geographically Eastern member states of the EU and NATO) against military threats through cooperation in NATO.
    - Strengthening the EU pillar within NATO – this indicates member states' preference to increase the EU's role (the EU member states of NATO to cooperate inside NATO) as a security actor within the framework of NATO, i.e. making the EU complementary to NATO.

- NATO – security guarantor for the EU – this indicates member states’ preference to prioritise NATO as a security and defence provider for the EU and its member states, meaning that the EU should not compete with NATO in providing security to its member states.
  - More independent EU – this indicates that member states’ officials explicitly mention their preference for developing independent capabilities for the EU in the fields of security and defence. Two sub-types of this preference are separated out:
    - Strategic Compass as an instrument for a more independent EU – this indicates member states’ preference of utilising Strategic Compass as a means of developing independent capabilities for the EU in the fields of security and defence.
    - Strategic autonomy, European Sovereignty, and Strategic Sovereignty – this indicates member states’ explicitly mentioning the preference of prioritising the aforementioned concepts promoting the development of independent capabilities for the EU in the fields of security and defence.
  - Minilateral formats – this indicates member states’ preference to deal with security threats in multilateral formats (such as the Franco-German axis, Weimar Triangle, Baltic countries, Visegrad 4 group, etc.).
- CSDP/Strategic Compass mentioned – this code counts the frequency of the member states’ officials mentioning CSDP and Strategic Compass in order to track how relevant these issues were in their discourse.
- Reforms of the CSDP/Strategic Compass mentioned – this code refers to the member states’ officials proposing changes (reforms) to the CSDP, including through proposing amendments to Strategic Compass. Several sub-codes are separated out:
  - Budgetary Reforms – this refers to the member states’ proposing changes to the CSDP (and related instruments, such as the European Peace Facility) budget in terms of the size and source of the budget.
  - Implementing Reforms – this refers to the member states proposing new ways/means of realising already existing policies and goals (such as acceleration of the implementation of the policy)
  - Institutional Reforms – this refers to the member states proposing new concrete changes in the CSDP, such as structural changes, development of new policies, forming new cooperations, etc.

- Initiatives, Ideas – this refers to the member states proposing more general initiatives and ideas, such as general concepts of Atlanticism or strategic autonomy or European sovereignty, etc.

By analysing the frequency, co-appearance, and context of these codes, this study attempts to reconstruct the preferences before the war in Ukraine in 2022 and show how they changed after the invasion. For instance, a higher frequency of codes related to more cooperation with NATO and the US would suggest the shifts towards advocating the EU's partnership with allies in the security and defence fields, while codes emphasising a more independent EU would indicate the shifts towards the idea of “strategic autonomy” or “European sovereignty”. Apart from frequency, the context of the codes, for instance, more clear/alarmed phrases attributed to a specific actor, e.g., Russia, would indicate a heightened threat perception after Russia's invasion of Ukraine and its potential impact on the CSDP. Besides, the codebook includes the codes explicitly related to the CSDP and the Strategic compass to capture more concrete ideas and initiatives about their proposed changes in the CSDP.

The following paragraphs describe the steps taken to collect the data for analysis.

- The meeting calendar, available on the official websites of the Council of the EU and the European Council, allows searching for meetings by date, entity, council configurations, and topic. The selected date range is from June 2020 to February 2024. The filters by entity and council configurations are European Council, Foreign Affairs Council and General Affairs Council, and the topics are Foreign Affairs & International Relations and Security & Defence<sup>1</sup>.
- Since the thesis focuses on the security and defence of the EU, the meetings that fall outside of this topic are excluded from the analysis.
- Respectively, the officials' statements are collected by the dates of the selected meetings. The pilot research showed that the most effective way to collect the statements was the state/government official websites. Because not all the relevant statements made by the officials are translated into English, the study also collects the statements in their original languages: Polish, French, and German. The Google Translate Extension on the Google Chrome browser is used to navigate websites. The following engines are used to translate textual statements from Polish, French, or

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<sup>1</sup> The website:

<https://www.consilium.europa.eu/en/meetings/calendar/?DateFrom=2020%2F06%2F16&DateTo=2023%2F02%2F24&Entity=122132&CouncilConfiguration=122512&CouncilConfiguration=122516&Topic=122195&Topic=122231&category=meeting>

German: DeepL, Google Translate, and ClaudeAI. The video statements are transcribed in MAXQDA and then translated into the mentioned engines. There are 103 statements collected in total. Out of them, 23 statements came from France, 41 - from Germany, and 29 - from Poland. To see the collected statements, see Annex 1.

- At the final stage, the statements are coded in MAXQDA. Due to their irrelevance to the topic, 17 statements out of the 103 are not coded. For the coding examples, see Annex 2.

The method applied to this MA thesis also comes with some shortcomings. The major shortcoming concerns the gathered data – statements only given after the European Council and the Council of the European Union meetings that discussed security and defence matters. As the selected officials have made numerous other statements, they may have discussed threat perceptions and their security preferences to a greater length, including the aspects not mentioned in the collected statements. Therefore, analysing only the gathered data to assess threat perception and preference formation have some limitations as it might have overlooked some important discourse. However, considering the length and scope of the MA thesis, a detailed examination of all statements from the research period is not viable, and, thus the selection of the statements, that are highly likely to provide member states' discourse about threat perceptions, security preferences and initiative regarding the CSDP, is justified. Another deficiency is associated with linguistic characteristics. Non-English statements are transcribed and translated into English only by the machines. They may produce non-accurate transcriptions and translations and lose or misunderstand the meaning of some words, idioms and cultural references. However, translation tools are already so developed that major errors are generally much less frequent.

## Analysis and Main Findings

This chapter starts with analysing the shifts in the selected member states' threat perceptions and which actors they consider as a source of threat. First, it will compare the frequencies of the code – “threat mentioned” and the subcodes “military threat (including terrorism)”, “hybrid threat (including disinformation, cyber-attacks, migration)”, “Economic and energy” and “Other”. Then, it will compare the frequencies of the code – “source of threat” and the subcodes “Russia”, “China” and “Other”. Considering that the statements are collected after the meetings related to security and defence matters, all of them are relevant to take into account while counting the frequencies of the codes. Also, frequencies are compared from two periods of different lengths. Therefore, all percentages of frequencies of the codes provided below are counted from the total number of each country's documents for each period (N). The first period starts from 15 June 2020 to 23 February 2022, and the second period starts from 24 February 2020 to 24 February 2023.

To start with France, Table 1. shows that overall, French officials devoted more attention to the security related threats after the war, which was expectable. However, it is interesting to examine whether and how the types of threats changed. The thesis analysed 14 documents of France from before the war period, and 9 documents from after the war. About 43% of the total number of France's documents before 24 February 2022 (N=14) mentioned some type of threat, while this number changed to almost 90% of the total number of France's documents after the war (N=9). The increased number of threats mentioned is not surprising due to the war. However, as mentioned already, it is interesting to analyse the distribution of types of threats. They also underwent a significant transformation. Particularly, 28.6% of the total number of France's documents before the war (N=14) mentioned military threats, albeit much focus was on the terrorism dimension. While unsurprisingly, 77.8% of the total number of documents after the war (N=9) contained the mention of military threat; while terrorism still remained a serious challenge for the EU, as per the French officials, the major focus, as expected, shifted towards military threats stemming from Russia. The focus on hybrid threats, including disinformation and cyber attacks, increased but by a lower margin – from 14.3% (N=14) before the war to 22.2% (N=9) after the war. This means that hybrid threat was considered a serious challenge, and more attention was devoted to it, but it remained the least mentioned type of threat. Another significant rise occurred in threat perception regarding economic and energy security. This is even more substantial, considering that most of the time before the war, the primary focus in this regard was on challenges posed by the COVID-

19 pandemic. After the war, economic and energy security-related threat perception was linked to Russia’s political blackmailing towards the EU.

	France June 15, 2020- February 23, 2022	France February 24, 2022-February 24, 2023
Threat mentioned	42.9%	88.9%
Military threat (including terrorism)	28.6%	77.8%
Hybrid threat (including disinformation, cyberattacks, migra	14.3%	22.2%
Threats to economic and energy security	14.3%	55.6%
Other		

Table 1. Frequency of codes related to Threat perceptions of France, calculated based on French official statements after the European Council and the Council of the European Union meetings regarding security and defence matters. Before the war, N=14; after the war, N=9.

The sole source of threat explicitly mentioned by French officials was Russia. However, the difference between the two periods was, as expected, the frequency of mentioning Russia – from around 21% of France’s documents (N=14) before the war to almost 89% of France’s documents (N=9) after the war. Moreover, the first period and also the early stage of Russia’s invasion of Ukraine was characterised by softer statements towards Russia, including advocating a diplomatic approach. In the later stages, the rhetoric of French officials towards Russia became increasingly hawkish. For example, on 10 December 2020, Emmanuel Macron stated:

On values, I believe we must be very clear. I said that with Russia, which I believe is a fact, we have a common history and geography. Russia is in Europe. And so it was in our interest to have an ongoing discussion, which the Chancellor and I do separately and together with President Putin. And I think it is important to continue doing so...So there are things we share, there are things we do not share, but what is important in my view, strategically, is that there will never be peace, security and stability on the European continent if we do not have a demanding discussion and results with Russia. (Official website of the President of France, 2020).

Macron still supported dialogue with Russia after three months of war. on 31 May 2022, while answering the question about the reasons why he called Putin, he said:

The goal is first to deal with some humanitarian issues, food security, access to the International Red Cross to prisoners and this type of thing. If you do not discuss this with the Russians, it is impossible to secure this type of operation... We have to keep discussing where Russia and Ukraine stand in order to prepare for peace the day they will resume the negotiations. And I think this is very important and this is our duty as Europeans, in full transparency. Those who will have to negotiate are the Ukrainians and the Russians, the day they will

decide, and the day the ceasefire will be real. But as Europeans, we will be part of the guarantors of such a process. So, it is normal to be involved with each party and keep discussing. (Official website of the President of France, 2022a).

Macron's initial approach how to deal with Russia's threat was well-reflected in his controversial remark that a diplomatic solution to the war should have been achieved at the expense of "not humiliating Russia", even over "a historic and fundamental mistake" to the history (Galindo, 2022).

However, the narrative of dialogue with Russia in French officials' communication decreased over time, while more harsh rhetoric towards Russia has seen a significant rise. On December 15, 2022, Macron stated: " We have adopted a ninth package of sanctions because Russia must pay the price for its unjustified aggression against Ukraine" Official website of the President of France, 2022b). In February 2023, Minister of Europe and Foreign Affairs of France, Jean-Yves Le Drian, stated:

In a few days' time, it will be a year since Russia attacked Ukraine, violating the most fundamental principles of the United Nations Charter - which it is supposed to uphold as a permanent member of the Security Council - as well as its own commitments, which it entered into when the Soviet Union was dissolved. And for a year, it has been carrying out executions, torturing, raping and deporting children in Ukraine. A year of bombing civilians, committing war crimes and, without doubt, crimes against humanity. So our message today is simple: we are asking it to stop, to withdraw its troops and to respect the sovereignty of Ukraine, which is an independent country. (Ministry for Europe and Foreign Affairs, 2023).

Regarding the threat perception of Germany, Table 2 also shows a significant increase in threats mentioned between the two periods. The thesis analysed 24 documents of Germany from before the war period and 17 documents from after the war period. 37.5% of the total number of documents from Germany before the war (N=24) mentioned some type of threat, while this number changed to almost 90% of the total number of documents from Germany (N=17) after the war. The distribution of the types of threats mentioned also changed drastically. Changes in the perception of military threat (from 29.2% of N before the war to 70.6% of N after the war) and economic/energy security (from 8.3% of N before the war to 41.2% of N after the war) were particularly noticeable. Germany had one of the highest dependence on Russia's energy. Therefore, Germany was the most affected after Russia leveraged energy as a tool for coercion (later, Nord-Stream pipelines supplying gas from



Russia to Germany were also sabotaged and taken out of service). This created an energy crisis in Germany, severely damaging the economy. This explains the increased focus of German officials on the threats regarding economic and energy sectors. Hybrid threats were not in the focus of German officials both before and after the war.

	Germany June 15, 2020- February 23, 2022	Germany February 24, 2022-February 24, 2023
Threat mentioned	37.5%	88.2%
Military threat (including terrorism)	29.2%	70.6%
Hybrid threat (including disinformation, cyberattacks, migra	8.3%	5.9%
Threats to economic and energy security	8.3%	41.2%
Other	4.2%	

Table 2. Frequency of codes related to Threat perceptions of Germany, calculated based on German official statements after the European Council and the Council of the European Union meetings regarding security and defence matters. Before the war, N=24; after the war, N=17.

The source of threat mentioned by German officials (see Table 3) sheds more light on the shifts in Germany’s threat perception. Namely, in the first period, before Russia’s full-scale invasion of Ukraine, Turkey (included in the “other” category in Table 3) was mentioned as a threat in the context of military tensions in the Eastern Mediterranean between Turkey and Greece and Cyprus, more frequently than Russia. On the contrary, after the war started in Ukraine, Germany’s threat perception drastically shifted, and only Russia was mentioned as a threat in the coded statements, instead of Turkey and China (which was previously mentioned in the context of being an autocratic power). Also, the frequency of mentioning Russia as a threat increased nearly four times – from 20.8% of Germany’s documents before the war (N=24) to 82.4% of Germany’s documents after the war (N=17). Before the war, Germany acknowledged the tensions and complexities in the EU’s relationship with Russia but also advocated for leaving room for dialogue and diplomatic engagement.

	Germany June 15, 2020- February 23, 2022	Germany February 24, 2022-February 24, 2023
Source of threat	45.8%	82.4%
Russia	20.8%	82.4%
China	4.2%	
Other	29.2%	

Table 3: Frequency of codes related to the source of threat of Germany, calculated based on German official statements after the European Council and the Council of the European Union meetings regarding security and defence matters. Before the war, N=24; after the war, N=17.

Poland’s threat perception was relatively different from that of both France and Germany. The thesis analysed 19 documents from Poland from 15 June 2020 to 23 February 2022 and 20 documents from 24 February 2020 to 24 February 2023. The threat mentioned among all documents of Polish officials from before the war period was already high at 68.4% (N=19), compared to France and Germany, as Poland has long been concerned about a security

environment in Eastern Europe, especially from Russia and Belarus. However, it still increased to 85% of Poland’s documents from after Russia’s full-scale invasion of Ukraine in 2022 (N=20). A noticeable difference between the two periods was the types of threats. Poland’s perception of military threat drastically increased from 36.8% of Poland’s documents from before the war period (N=19) to 80% of Poland’s documents after February 24, 2022 (N=20). In the first period, hybrid threats, including disinformation and migration, dominated the discourse of Polish officials. This was primarily due to hybrid warfare tactics employed by Belarus against Poland (and Lithuania), namely, directing artificial migration flows towards Poland. Despite this, attention to hybrid threats remained considerably high in Poland. Compared to France and Germany, the perception of hybrid threats was several times higher in Poland (double that of France and seven times more than Germany). The decrease resulted from prioritising the military threats after the war and the subsiding migration crisis on the Belarus border. It is also noteworthy that the focus on hybrid threats after Russia’s invasion of Ukraine in 2022 shifted relatively from migration to Russian disinformation and propaganda. It was also present in the previous period but gained much attention after February 2022 as Russia increased its intensity of propaganda and disinformation campaigns.

The perception of threat in the economic and energy sectors in the eyes of the Polish officials also increased from 10.5% of Poland’s documents before the war to 25% of Poland’s documents from after the war. Threats to economic and energy security were mentioned in a quarter of the Poland’s documents after the war. Poland was also affected by Russia leveraging Poland’s energy dependence, which is why the increase occurred. However, Polish dependence on Russian energy resources was lower than that of Germany, and also Poland managed to overcome the crisis in a shorter period than Germany by feeling the deficit from other sources – for instance, Poland imported a lot of LNG, whereas Germany did not have sufficient infrastructure for that.

	Poland June 15, 2020- February 23, 2022	Poland February 24, 2022 - February 24 2023
Threat mentioned	68.4%	85.0%
Military threat (including terrorism)	36.8%	80.0%
Hybrid threat (including disinformation, cyberattacks, migra	63.2%	45.0%
Threats to economic and energy security	10.5%	25.0%
Other		

Table 4. Frequency of codes related to Threat perceptions of Poland, calculated based on Polish official statements after the European Council and the Council of the European Union meetings regarding security and defence matters. Before the war, N=19; after the war, N=20.

Due to geographic/geopolitical and historical factors, Poland was one of the most alarmed and concerned about Russia’s full-scale invasion of Ukraine, as described in the contextual background chapter. This was also evident in the data showing that Russia was mentioned as

a threat in 90% of Poland's documents from after the war period (before the outbreak of the war in 2022, the number stood at 57.9%). Even before 2022, Poland frequently mentioned Russia in the context of Russia's increasingly aggressive policies, including towards Ukraine, its support for Lukashenko's regime in Belarus, conducting disinformation campaigns and its use of energy and economy as tools for political blackmailing. It called on the EU multiple times to develop an "ambitious agenda" to respond to Russia's assertive power and boost transatlantic cooperation and partnership with the US to deter Russia. After the war, the rhetoric of Polish officials became even more hawkish, and they openly expressed their dissatisfaction towards the EU's soft politics towards Russia and repeated multiple times that Poland consistently warned the EU about the Russian threat.

After studying the selected member states' threat perceptions, it is evident that the shifts in threat perceptions after the war would result in shifts in member states' preferences regarding the CSDP. The next step in the analysis will be reconstructing the preferences before the war and tracking how they changed after the war based on the coded statements of the selected member states' officials after the European Council and Council of the EU's meeting related to the defence and security matters.

The analysis showed no major difference in how France framed the CSDP and the Strategic compass before and after the war. Since the day the EU leaders started working on the Strategic Compass, France has emphasised the significance of the document for the EU to become a more autonomous and sovereign actor in the international arena. French officials have been calling the compass the first ever "European defence white paper", which would ensure Europe's capability to address common threats with unified objectives and specific actions. It also mentioned the importance of cooperation between the more sovereign EU and NATO. After the war, focus on more strategic autonomy and European sovereignty remained central to France's preferences. Indeed, the emphasis on these concepts increased after the war. The issue of enhancing the EU's defence industrial capabilities was framed as a main component of European sovereignty. The role of cooperation with NATO remained in France's preferences, however, only in these circumstances where the EU would be an equal, autonomous actor inside NATO. Overall, after the war, France prioritised pursuing strategic autonomy and European sovereignty to more degree than cooperation with NATO. In particular, it considered the Strategic Compass to be a key instrument in increasing the EU's strategic sovereignty.

Analysing German officials' statements revealed that among the selected countries, it is evident that Germany changed its discourse towards the CSDP and Strategic Compass more

than the other two. Before the war, it framed Strategic Compass as a long-term planning tool to enhance the EU's international role and the united approach towards common threats. However, after the war, Germany shifted its discussion regarding the CSDP and Strategic Compass towards practical implementation and immediate crisis response. It is noticeable that Germany's discourse after the invasion included more focus on the military readiness of the CSDP to achieve its sovereignty than it had in the prior period. Similarly, before the war, it also emphasised EU-NATO cooperation in the sense of promoting strengthening the European pillar within NATO, including through the implementation of the Strategic Compass framework.

The document analysis showed that the frequency of mention of the CSDP and the Strategic Compass by Poland before and after the war did not change drastically. However, the context and emphasis have changed, and the post-war discourse shows a more urgent and proactive approach towards security and defence. Before the war, Poland actively promoted close transatlantic cooperation with the US and NATO, stressing the need for the presence of NATO forces at the EU's Eastern border. It advocated for the EU to be complementary to NATO and to avoid competition and overlapping capabilities. Poland, unlike France, did not prioritise a policy that promotes the EU's independent defence capabilities. Based on the analysis of the coded statements, Russia's invasion of Ukraine only increased Poland's support for more EU-NATO relations and also advocated for NATO's expanded role in the EU's security architecture, especially in the Eastern flank. Particularly, Poland framed the Strategic Compass after the war more as a mechanism to complement NATO, not to achieve the EU's strategic autonomy.

Based on the threat perceptions and preferences regarding the CSDP policy, all three countries had their ideas and initiatives concerning reforming the CSDP. Some of them were clearly stated, while others were expressed in their wider discourse. The final stage of analysis examines how the shifts in the selected countries' threat perceptions and preferences were reflected in these countries changing their advocacy regarding reforming the CSDP. The comparison is drawn between the periods of June 2020 and February 23, 2022, and February 24, 2022 to February 24, 2023, to study this aspect. The focus is on budgetary reforms, reforms concerning the implementation of the existing instruments/policies, institutional reforms, and initiatives and ideas. The argument of this thesis is that the changing positions/preferences of the three major EU players in the CSDP area (France, Germany and Poland), caused by shifts in their threat perceptions and preferences, subsequently led to the changes in the CSDP after Russia's full-scale invasion of Ukraine in 2022.

To start with France in the 2020-2022 period, in line with its threat perceptions and preferences, its officials advocated for initiatives and reforms in the CSDP that would lead to the formation/strengthening of the EU's strategic autonomy. For instance, France advocated for the creation of an "ambitious Strategic Compass" that would develop military capabilities in the EU and make it possible for the EU to conduct more joint CSDP operations/missions. French officials explicitly mentioned that the Strategic Compass should have served as an instrument for European sovereignty and made that issue a priority under the French Council Presidency. Other initiatives supported by France aimed at strengthening the EU's strategic autonomy/sovereignty were the Future Combat Air System - FCAS (it was led by France itself) and Main Ground Combat System - MGCS (it was led by Germany but supported by France) – both intended to ramp up the European defence industry. France also advocated for the creation of the European defence space strategy that also fits in the concept of the sovereign EU being able to act independently. As analysed in the previous stage, France's preferences also included cooperation with NATO, but its intensity was lower than that of promoting the development of the EU's independent capabilities. This was reflected in France's approach towards the CSDP reforms. Namely, in the framework of the Strategic Compass, French officials wanted to highlight the need for the EU to strengthen balanced partnerships with NATO and also to coordinate the works on the EU's Strategic Compass and NATO's new Strategic Concept. Hence, France's position can be summarised as advocacy in favour of an ambitious agenda to create and strengthen the EU's independent capabilities that would enable the EU to act independently in more complex situations but also preserve close coordination with NATO, albeit on equal footing with the US and other non-EU actors that would be possible by strengthening European sovereignty, including by developing new capabilities and building up defence industry.

The analysis of the French officials' statements after the day of Russia's invasion of Ukraine showed that France doubled down on its push for European strategic autonomy. France pushed forward the so-called "Versailles agenda", framed by France as a significant advancement towards European autonomy and the ability to act without being overly dependent on others. The shift of the French threat perceptions and preferences after the war – increased emphasis on the development of the EU's strategic autonomy at the expense of the preference for stronger ties with NATO and heightened focus on military threats and threats to economic and energy security – was reflected in the French initiatives regarding the CSDP. Namely, through the "Versailles agenda", France tried to push for increased investment and development of European defence industrial capacity. One of the major changes in the CSDP

regarding the EU member states' decision to invest more and smarter in EDITB is the instrument of a victory for France's preferences. In this context, France also actively promoted the initiatives of joint construction (such as acceleration of FCAS and MGCS programmes) and joint procurement of defence capabilities (for instance, in the framework of European Defence Industrial Strategy – EDIS), with emphasis on the EU member states purchasing European defence equipment. France was largely successful in uploading these initiatives at the EU level as the Commission included them in its proposals. Additionally, through the “Versailles agenda”, France advocated for the development of European capacities in space, cyber and maritime dimensions. Also, simultaneously with initiatives focused on strengthening defence capabilities, France devoted efforts to achieving energy independence from Russia.

Before the war, as witnessed in its perceptions of threats and preferences, Germany did not focus much on threats, and its preferences were less explicit. Instead, it was oriented toward the long-term vision of the EU. Germany also supported the EU becoming more capable of acting and preserving its values and interests but was not as active as France in pushing for it. The Strategic Compass threat analysis phase coincides with the German EU Council Presidency. Alongside the classic types of threats, Germany also proposed the inclusion of hybrid threats, such as the issues of digitalisation and artificial intelligence. In line with the threat perceptions analysed above, German officials devoted more attention to the tensions in the Eastern Mediterranean than threats stemming from Russia. Hence, it was more oriented on the long-term planning and development of instruments, such as strengthening operational engagements and capabilities of the CSDP missions abroad, fine-tuning the EPF mechanism, developing the PESCO instrument and including third countries in it.

As the war in Ukraine significantly altered Germany's threat perceptions and preferences, Germany's approach towards the CSDP also changed. Most notably, Germany decided to invest EUR 100 billion in national defence, which also envisaged making more contribution (in line with Germany's size) to the EU's common security. Strategic Compass became a more immediate matter for Germany. Its aim was to make the military more flexible and capable of acting, including through further development of the EU's battlegroups, to reach full operational capability to act rapidly in crisis situations. Germany's increased urgency towards the CSDP was also evident in its push for the rapid implementation of the Strategic Compass, with Germany becoming the core of the rapid reaction force in 2025.

After Russia's full-scale invasion of Ukraine, it also supported the development of joint European defence capabilities.

Polish positions towards the CSDP reforms before the war reflected its threat perceptions and preferences – namely, Poland advocated for developing EU capabilities in a manner that would supplement NATO, not duplicate or compete with NATO and, in this sense, supported the increase of the coordination between the EU and NATO in defence matters. For instance, Poland preferred relying on and using existing NATO command structures rather than developing independent equivalent EU structures in order to avoid duplication of systems and costs. Poland also framed the Strategic Compass in the context of the inclusion of the EU defence architecture within NATO's framework. Concerning the specific ideas in the context of Strategic Compass, Poland favoured focusing on more realistic goals rather than grand plans of the EU's strategic autonomy. Polish perception of hybrid threats was also reflected as it pushed for the inclusion in the Strategic Compass of the development of swift and effective response mechanisms towards hybrid threats, building resilience against cyber threats and disinformation campaigns. Polish and French positions converged regarding coordination between the creation of the EU's Strategic Compass and NATO's Strategic Concept. Poland also actively supported the inclusion of third countries in the PESCO initiatives.

As Polish threat perceptions shifted heavily towards military threats after Russia's full-scale invasion of Ukraine in 2022, this became evident in Polish initiatives towards the CSDP. Particularly, Poland increased its focus on strengthening the EU's defence potential and capabilities, including through joint procurement. However, Poland's preferences still diverged from those of France and Germany regarding the EU's strategic autonomy, and for instance, Poland was not as supportive towards efforts to develop the European defence industry. Poland's reservation was not to directly compete with the defence industries of the US and South Korea – from which Poland is purchasing huge amounts of modern weaponry, but to complement it, especially because Poland was the most concerned with the immediate military threat from Russia and did not want to risk distancing from the US and South Korean arms manufacturers as development of European production capacity would take much time. Poland supported all EU defence initiatives that were in the framework of NATO and welcomed Sweden and Finland joining NATO as a means to strengthen the Atlanticist core in the EU. As Poland was wary of threats stemming from Russia, it actively advocated for the EU's measures to support Ukraine militarily. Poland also enthusiastically backed the EU initiatives that addressed immediate military concerns, such as increasing investments and

accelerated implementation of the EU Military Mobility programme, because it enabled faster deployment of forces over longer distances and increased the budget for the European Peace Facility (in fact, it was increased by EUR 2 billion, but Poland was disappointed as the amount was much less than desired by it).

The thesis employs Discursive Institutionalism (DI) to summarise the above analysis points and answer the research question. The shifts in France's, Germany's and Poland's threat perceptions and preferences were tracked in line with the DI. Based on the coded and analysed statements of the heads of state/government defence and foreign affairs ministers, it was evident that Russia's full-scale invasion of Ukraine resulted in changes in their communicative discourse. Then, by analysing ideas/initiatives regarding the CSDP reforms before and after the war, it can be concluded that shifts indeed occurred in the approaches of France, Germany and Poland about the CSDP reforms. The drivers of these changes were traced into the shifts of the selected member states' threat perceptions and policy preferences. The shifts in the threat perceptions and preferences resulted in changes in the communicative discourse of the selected member states' officials. As France, Germany, and Poland are the main players in the CSDP area with the most influence, they were primarily successful in uploading their declared policy preferences to the EU level. Henceforth, as the MA thesis assumed, the changes in the discourse of the relevant officials eventually led to the changes in the institutional and policy changes in the CSDP. DI also rightly predicted that the member states would also heavily focus on normative ideas – France, in line with its values, norms and strategic culture, emphasised the policies derived from the concepts of “European sovereignty” and “strategic autonomy”, while Polish preferences primarily came from its Atlanticist strategic culture and normative ideas of deterring Russian aggression.



## Conclusion

To sum up, the MA thesis studied the shifts in the CSDP after Russia's full-scale invasion of Ukraine due to its immense relevance. The research traced the drivers of the changes in the statements of the member states' given after the European Council and the Council of the European Union meetings regarding security and defence matters. Due to the scope of the MA thesis, it explored the issues based on the cases of France, Germany and Poland – the three most influential in the CSDP area. The research period was chosen after the EU started working on the Strategic Compass in June 2020 until the one-year anniversary of Russia's invasion on February 24, 2023. The idea behind this selection was to compare two periods: June 2020-February 23, 2022 (before Russia's full-scale invasion of Ukraine) and February 24, 2022 (i.e. after the full-scale war in Ukraine)-February 24, 2023 (to cover one year period – justified as a relevant timeframe to fit in the scope of the paper and at the same time, sufficiently observe the changes in the CSDP after the war). The comprehensive literature review collected the existing knowledge on the related issues and revealed the gaps in the literature, especially as the research topic is relatively new and Poland was usually neglected in most papers.

The research collected empirical data in the form of 103 statements from three countries in total. They were coded in MAXQDA based on codes mainly related to threat perceptions, policy preferences and CSDP reform initiatives. The gathered data was analysed using a mix of quantitative and qualitative data analysis methods. The theoretical framework employed in the thesis was Discursive Institutionalism (DI). In line with the theory, the thesis also provided background information on the origins and recent developments in the EU's security and defence policies to serve as the context of the collected/analysed statements. The research analysed new patterns in the CSDP policy area after the war. Then, the paper analysed the change in member states' threat perceptions before and after the war in Ukraine and how they were reflected in the changing policy preferences of the member states concerning the CSDP. This analytical information was utilised to track the influencing factors of the transformed CSDP agenda of France, Germany and Poland. It was evident that new patterns in the CSDP included both new ideas and initiatives, as well as strengthening and acceleration of the implementation of the already existing CSDP instruments.

Not to repeat the results of the analysis, it can be briefly summarised as follows: Poland had more Atlanticist views before the war, and it remained so after the war, however, Poland was the most concerned about the military threats and, therefore, advocated for some EU-

wide initiatives, as well, that would not compete with but complement NATO (such as European Military Mobility); France was already the most vocal advocate of the EU's strategic autonomy, but after the war, its threat perceptions significantly increased, and therefore, France also proposed more active measures to address military and energy security issues, primarily through the Strategic Compass and "Versailles agenda". Additionally, after the war, France ticked the balance more in favour of the "autonomous EU" compared to the pre-war period when EU-NATO cooperation had more attention in France's preferences; Germany underwent the most significant policy change amongst the three as it was the least concerned about Russia's threat, whereas after the war Germany acknowledged Russia's threat in multiple sectors, such as military, economic and energy, and came up with relevant proposals. Germany remained balanced between the EU-centric and Atlanticist approaches.

This MA thesis can serve as a basis for further research projects. For instance, it showcased the explanatory value of Discursive Institutionalism in tracking the changes in the EU's CSDP. Therefore, it can be applied to different timeframes, different member states, different selections of statements, and also related policy areas, such as the Common Foreign and Security Policy (CFSP). The given MA thesis can also form a basis for larger multi-level studies of the changes in the Common Security and Defence Policy after Russia's full-scale invasion of Ukraine in 2022.

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