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EU PROJECTS IN THE FIELD OF SECURITY AND DEFENSE: CHALLENGES AND PROSPECTS OF IMPLEMENTATION

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Abstract: *The article dwells upon the problems of implementing the EU defense strategy, taking into account the leading European concept, strategic documents and the current initiatives in the EU security and defense sector. It was proved that due to the divergent views of the EU member states, there exist the following interpretations of the leading defense concept, namely: 1) “strategic autonomy / sovereignty” (France, Germany, Spain, Italy) considers independence in decision-making, increased integration and generating of finances and resources; 2) “strategic responsibility” (Netherlands, Finland, Estonia) is about greater collective contribution to the regional security system, which provides for a balance of interests in the EU-NATO-USA partnership; 3) “open strategic autonomy” (Poland, Slovakia, Hungary, Lithuania, Latvia) deals with preservation of power only in priority areas of EU activity. The peculiarities of the transformations of the EU defense strategy were identified, and the following three EU strategic documents were analyzed, i. e., the European Security Strategy of 2003, the EU Global Strategy of 2016, and the EU Strategic Compass of 2022. It was determined that the Strategic Compass should introduce consistency in the rules, the management structure of the defense initiatives, clarify the boundaries between ambition and pragmatism, and integrate the defense sector. The strengths and weaknesses of the defense initiatives both within the framework of EU treaties (PESCO, CARD, EDF) and outside them (E12) were pinpointed. The set of shortcomings detected in the abovementioned defense initiatives were outlined. The priority scenarios are represented. It has been predicted that by 2030, under the conditions of preserving the ambition of “strategic autonomy”, it is necessary to take a set of the following measures: 1) to define a single vision of their cooperation; 2) to find out the structure of the defense cooperation within the framework of EU treaties (PESCO) or outside the EU (E12); 3) to clarify the rules of the defense sector management and a special body for decision-making.*

Keywords: EU defense strategy, Strategic Compass, Russian-Ukrainian war, PESCO.

1. Introduction

Since the time of its foundation, the European Union has not assumed the role of protector and defender in terms of military issues of the European continent, but took as its basis the “theory of a non-military state”. That is why the ability of the European Union to use military force to settle conflicts on the European continent has always been low and unlikely. Obviously, the EU tried to avoid direct confrontation in most of the conflicts that took place in the neighboring countries of Europe. Security and defense factors came under the competence of the North Atlantic Alliance, based on the fact that the member states of the Community are also the members of NATO. However, the events in the modern world have forced the EU to reconsider its security role on the world stage. With the changing security environment and geopolitical challenges, Brussels began to position itself as the “security maker” on the European continent.

The discussions regarding the ability of the European Union to protect the European continent from potential military threats began as early as 2014. However, such discussions were not successful and considered inappropriate, since the main component which was paid due attention to was the economic one. Besides, in 2022, the discussions on the strategic autonomy

of the EU in the field of security and defense were intensified again in the context of Russia's invasion of Ukraine. In this regard, back in October 2021, the head of the European Council, Charles Michel, made a statement that 2022 was declared the "year of the European defense" (Herszenhorn, 2021). Such a decision was intended to show that the EU states are capable of resisting the widespread misconception that Europe is not capable of defending itself militarily.

The High Representative of the EU for Foreign Affairs and Security Policy, Josep Borrell, also emphasized that one of the many tasks which the European Union is facing deals with relearning the "language of power". His words marked the beginning of a review of the global role assumed by the association.

This position was supported by the head of the Austrian Ministry of Foreign Affairs, Alexander Schallenberg; he added that he was deeply convinced that the Russian war, which was launched against Ukraine, forced the European community to look at the security situation from a different angle. He claims that it was this military aggression that pulled political leaders and society out of their false dreams of a post-national and post-historical Europe and inspired large-scale changes that would not have taken place due to the organization's unwillingness to look at the world affairs without rose-coloured glasses, thus giving the desired valid.

On March 25, 2022, a month after the start of the Russia's full-scale military invasion of Ukraine, the Strategic Compass was adopted at the Community summit, which should provide an explanation of the Europe's role in the defense sector and determine the vector of the EU future defense policy. As the new Defense Strategy, the Compass tries to fill the gap between the common objectives of the Community set out in the Global Strategy of the European Union 2016, the European Security Strategy of 2003 and the instruments for building up military forces and capabilities (PESCO, CDP/CARD, EDF).

The new EU Defense Strategy gives the Community a chance to strengthen its influence in solving global problems of humanity, namely, war, struggle for energy sources, climate catastrophe and health crisis. However, no matter how ambitious the Strategic Compass may seem, its scope and results will depend crucially on the extent to which European states are willing to revise their national defense ambitions. This raises the issue of whether the EU will be able to face security challenges and implement the defense strategy.

The aim of the article is to research and analyze the key problems of the implementation of the EU defense strategy and the prospects and possible trajectories of its development.

2. Literature review

Scientific studies that analyze the issues of the EU defense strategy implementation can be divided into four main groups. The first group focuses on understanding the concepts of European strategic autonomy and sovereignty in the field of security and defense. Within this group, many contributions are focused on clarifying the term “strategic autonomy” (Bailes, 2005; Erlanger, 2020; European strategic autonomy in ..., 2021; Kempin, Kunz, 2017) and its characteristics (Lippert, Ondarza, Perthes, 2019); Arteaga, 2017b). The researchers additionally pay attention to the “strategic sovereignty” (Leonard, Shapiro, 2019; Lefebvre, 2021), and the distinctions between strategic sovereignty and strategic autonomy (Arteaga, 2017a).

The second important group of studies is aimed at analyzing the regulatory and legal field of security and defense of the EU. It was important to find out the origins of the idea of the European defense (Franco–British St. Malo Declaration ..., 1998) and subsequent documents that contributed to the settlement of this issue (Implementation Plan on Security and Defense, 2016; Establishing the European Defense Fund: ..., 2021). Special attention was paid to the following documents: EU Strategic Course (Missiroli, Tocci, Mogherini, 2015; Myronova, 2022), “Shared Vision, Common Action: A Stronger Europe” or EU Global Strategy (Yildirim, 2021; Shared Vision, Common Action: A Stronger ..., 2016; Vincenti, 2016; Missiroli, Tocci, Mogherini, 2015; The European Union’s global strategy ..., 2019; Le Gleut, Conway-Mouret, 2021) and Strategic Compass (Questions and answers: threat analysis ..., 2020; Wagner, 2022; For a European Union that protects ..., 2022; Le Gleut, Conway-Mouret, 2021; Paul, Shea, Chihaiia, Ciolan et al., 2022).

The third group aims at outlining the challenges faced by the EU while implementing the defence strategies. When considering the EU *Permanent Structured Cooperation on Security and Defense (PESCO)* platform, it was found out which countries are its members (Establishing permanent structured cooperation (PESCO) ..., 2017), as well as the progression of the launching projects (Permanent Structured Cooperation (PESCO)) with their further prospects (Dorosh, 2023b; Dorosh, Ivasechko, Nocoń, 2020). The strengths (Development, Delivery and

Determination: PESCO ..., 2022; Peruzzi, 2022; Paolucci, 2021; Concerning a roadmap for the implementation ..., 2018) and weaknesses of PESCO were pinpointed and clarified (Le Gleut, Conway-Mouret, 2019; Barigazzi, 2021; PESCO Strategic Review 2020, 2020). *The EU's Coordinated Annual Review on Defense (CARD)* provides the opportunity to monitor all the EU states' defense spendings and investments, including the research (Waard, 2020; Borrell, 2023). The strengths (Fiott, 2017) and the weaknesses (Report CARD 2020, 2020; Reybroeck, 2019) were clearly outlined. Having analysed the *European Defense Fund (EDF)* (Establishing the European Defense Fund: ..., 2021; European Defense Fund: EU to invest..., 2023), it is possible to clearly identify their strengths (For a European Union that protects ..., 2022; The European Defense Fund (EDF), 2022; European defense fund – performance, 2021) which were acquired in a short time of its existence and their weaknesses (Ilmonen, 2021; Nádudvari, Varga, 2019; Zandee, 2021), which are the obstacle for the work of the fund. The study also examined the strengths (Letter of Intent between the ..., 2018; Mills, 2019; 2022 military strength ranking, 2022) and the weaknesses (Mölling, Major, 2018) of the European Intervention Initiative (EI2) (Sjökvist, Frisell, 2023; “Vladimir Putin has jolted back NATO”..., 2023).

Finally, the fourth group of studies highlights the possible development algorithms in the field of security and defense of the EU. The scenarios for the progression of European defense events in the world in 2025 have been determined (Future of European Defence: reflection paper, 2017).

3. Theoretical and methodological foundations of the study

The defense strategy of the EU has always been a relevant research issue for the representatives of scientific and political spheres, and in recent years it has increasingly begun to emerge in the published works. The luminary of diplomacy Henry Kissinger (1962) in his article “Unsolved Problems of European Security” clearly indicated which challenges the European region faces when it comes to its security. In general, the issue of the EU defense strategy was paid attention to by such researchers as Eric Brattberg, Tomasz Valašek (2019) and Felix Arteaga (2017), who studied, identified and described the weak links in the defense of Europe. It is known about the differences in the idea of the defense strategy of the EU, and, therefore, scientists could not ignore the “strategic autonomy/sovereignty” as one of the

interpretations of the leading concept and tried to clarify what is meant by this definition (Koenig, 2020). Besides, Lorenzo Vai (2021) managed to describe the genesis and development of the idea of “strategic autonomy” and explained the aspects of this term and which political spheres are included in it. Sascha Lohman (2021) made an attempt to conceptualize “strategic autonomy” through the prism of contextualizing its political genealogy and use. It is also significant that such researchers as I. Yakovyuk, O. Tragnyuk and D. Boychuk (2020) are convinced that the implementation of the idea of the “European sovereignty” in the area of security and defense will not lead to direct competition between the EU and NATO, but take more responsibility for its own security and the security of its neighbors and strengthen its role in transatlantic relations. Henric Larsen (2022) notes that Russia’s invasion of Ukraine represents a new political reality in which European states are ready to strengthen their role in continental defense. However, the main focus should be on “strategic responsibility” and not on the “strategic autonomy”, which is unrealistic both from the military and political viewpoints. Nicholas Burns and Douglas Lute (2019) in their report, which was considered with NATO, suggested that “strategic responsibility” could be a better concept for the European Union. “Strategic responsibility” is a more accurate term that encompasses Europe’s efforts to take on additional responsibilities for the security of its neighbors without undermining cooperation with international partnerships and alliances (Helwig, 2020). Investigating the concept of the “open strategic autonomy”, Eric Van den Abeele (2021) highlights the origins of the term and represents the evolution of the denoted concept of the “open strategic autonomy” in order to analyze its foundations and further consequences. Mavluda Sattorova (2023) focused on considering the fundamental principles of the open strategic autonomy of the European Union. It is quite obvious that the transformations of the EU defense strategy (Violakis, 2020) contributed to the development of the regulatory framework that regulated this issue, i.e., the European Security Strategy of 2003 (Becher, 2004; Toje, 2005; Biscop, 2010; Anderson, Brattberg, Häggqvist, Ojanen, 2011), EU Global Strategy 2016 (Smith, 2017; Pishchikova, Piras, 2017; Biscop, 2021), and EU Strategic Compass 2022 (Blockmans, Macchiarini, Paikin, 2022; Sweeney, Winn, 2022; Gjoreski, 2022; Biscop, 2022; Dorosh, Lemko, 2022, Dorosh, 2023a). The theoretical points of view were also presented for defense initiatives that are enshrined in EU treaties, namely, PESCO (Wolfstädter, Kreilinger, 2017; Biscop, 2017; Biscop, 2020; Billon-

Galland, Efstathiou, 2019; Blockmans, Crosson, 2021), CARD (Reybrouck, 2019), EDF (Haroche, 2020; Sabatino, 2022); additionally, the EI2 initiative (Koenig, 2018; Zandee, Kruijver, 2019) which is outside the EU agreements, was represented for better theoretical awareness.

4. European strategic autonomy and sovereignty in the field of security and defense

The term “strategic autonomy” has an old French origin and is defined as the ability to independently use one’s own military power, while in the modern interpretation the concept of “European strategic autonomy” is the ability to independently decide and determine one’s own priorities in the field of security and foreign policy, taking into account financial, institutional and political resources, whether it is in partnership with third countries or, if necessary, independently (Bailes, 2005; Erlanger, 2020).

Effective strategic autonomy is characterized by the ability to create, change and control international rules, as opposed to unconscious submission to the rules of others. The contrary to the strategic autonomy is dependence on strategic decisions made by other states (Lippert, Ondarza, Perthes, 2019).

The traditional definition of autonomy has expanded its meaning, where in addition to the concept of “hard power”, there are issues of defense, energy, raw materials, medicine, innovation, finance, etc. Nevertheless, it is recognized that the essence of the concept of the “European strategic autonomy” is related to the ethical understanding of security (European strategic autonomy in ..., 2021).

The Spanish researcher Fernando Arteaga adheres to the vision that regardless of terminology and interpretations, the viability of strategic autonomy depends on political and financial prerequisites. The political prerequisite is the alignment of the strategic culture. After all, it is not worth declaring a high level of political ambitions if there is not enough will to implement them. In case of financial prerequisite, strategic autonomy requires additional budgetary efforts (Arteaga, 2017).

According to the scientists Ronja Kempin and Barbara Kunz, the cornerstone of the modern idea of strategic autonomy of the Community is the independence of the army and

politics in the system of multilateral organization. Therefore, such autonomy has the following three elements:

1) political autonomy (Strategy), achieved through a qualified majority to independently decide on security policy issues;

2) industrial autonomy (Equipment) is developed via increasing defense potential to achieve autonomy in military activities;

3) operational autonomy (Capabilities) deals with the ability to independently develop an action plan for operations and implement it on a civilian or military scale (Kempin, Kunz, 2017, p. 10).

It is worth noting that traditionally the term *strategic sovereignty* is often equated with *national sovereignty*. However, the definition of the “strategic sovereignty” is explained as the establishment of one’s own rules in the international arena, and not deepening into the national governance of European countries. The key goal of this type of sovereignty is to establish favorable conditions where EU citizens have a common vision for the future of Europe (Leonard, Shapiro, 2019).

The French diplomat, Maxime Lefebvre, claims that “the tool for achieving strategic sovereignty is strategic autonomy”. Such an integrating concept may seem less ambitious, less politicized and more state-centric, but the adjective “strategic” enhances its importance, as the French politician adds (Lefebvre, 2021).

A distinguishing feature of the strategic sovereignty from the autonomy is that European sovereignty is still subject to limitations and relative character. Accordingly, the economy, society, culture, education, health care, police and judicial system remain national prerogatives, while the spheres of diplomacy, defense and finance belong to the principle of unanimity (Arteaga, 2017a).

Concurrently, effective strategic sovereignty is the ability to achieve the expected result regarding one’s own rules and ambitions, and the prerequisites for such strategic sovereignty are the shared strategic vision and the ability to act and decide (Leonard, Shapiro, 2019).

5. Normative and legal regulation in the field of security and defense of the EU

The European Union is a subject of international relations, which implements the European identity, expresses the position of EU citizens, directs policy based on democratic principles, and has the appropriate attributes of power (currency, legislation), i.e., it is a sovereign within a multilateral organization.

Initially, the idea of European defense autonomy appeared in the Franco-British declaration of 1998. The clarity of the declaration is equal to its ambitious content: “in order to be a full-fledged player in the international arena, the Community must have the opportunity for independent actions, which are secured by military power, tools to make decisions, and the will to respond to the international crises” (Franco-British St. Malo Declaration ..., 1998).

Subsequently, the concept of strategic autonomy was transformed into the ambition of the EU defense strategy from 2016. Thus, the Strategy encourages determination to act independently to combat new security challenges (Implementation Plan on Security and Defense, 2016).

It is worth paying attention to the Regulation of the European Defense Fund (EDF) from June 2021, the purpose of which is to promote the strategy of self-sufficiency and freedom of action of the Community by strengthening the innovation potential of the industrial and technological base (EDITB). Accordingly, this interpretation of the “strategic autonomy” gives this concept even greater value (Establishing the European Defense Fund: ..., 2021).

On December 12, 2003, the High Representative of the EU for External Relations and Security Policy Javier Solana made public the project of the first strategic course of Europe, which describes the global challenges in the security environment, delineates priorities and highlights the expected consequences (Missiroli, Tocci, Mogherini, 2015).

The EU Strategic Course of 2003 characterizes the European security environment as the space full of challenges of a low quality of life; the collapse of state governance; the struggle for energy sources and resources; terrorism; the emergence of criminal groups; the escalation of conflicts in the regions; the emergence and the use of new types of weapons that affect a large radius of the territory both chemically and destructively. Terrorism is highlighted in the European Security Strategy as the type of threat that is one of the components of social relations.

The sources of terrorism can be corruption and a high level of crime (Missiroli, Tocci, Mogherini, 2015).

In addition, the Javier Solana hoped that such a strategic course of Europe would bring the following results:

- 1) the development and harmonization of the EU defense sphere with the priorities of the foreign policy course and crisis management;
- 2) the growth of military and defense potential through mobile and operational models of armies and convergence of the resources;
- 3) the integration of defense research into the common system;
- 4) increasing the role of diplomacy;
- 5) expanding the network of partners, primarily with Canada, Japan, China, India and Russia (Myronova, 2022).

From the practical point of view, the European Security Strategy showed how to transform its own values into precise mechanisms, where the Community was guided by the principle of multilateralism, preventive actions and the comprehensive (complex) approach in solving problematic phenomena. However, apart from the general acknowledgment of the threats and methods, the strategy contains little explanation of the resources that are needed to achieve these goals, i.e., how many and which ones are needed. In short, the first EU strategy codified the objectives, but did not really take into account the capacity of the European Union and a clearly defined implementation plan. Therefore, the European Security Strategy (2003) is not a strategic course of the EU, but rather a leading concept for the development of the Common Foreign and Defense Policy.

The next strategic document, entitled ***“Shared Vision, Common Action: A Stronger Europe” (or EU Global Strategy)***, appeared after world events such as the financial crisis and the Russian-Georgian war of 2008, the Arab Spring revolution of 2010, the Russian-Ukrainian war of 2014, and the Brexit decision of 2016. The Official Brussels was looking for the strategic document that would combine more defense tools for two reasons: 1) to be able to face new security challenges; 2) to consolidate the place of the European Union in the world market of the defense industry (Yildirim, 2021).

On June 28, 2016, Federica Mogherini, being the High Representative of the EU foreign and security policy, approved the new course of European strategic planning, namely, the EU Global Strategy. The key goal of the document is to change the way of strategic thinking of the European Union from the concept of idealism about government powers with the manifestation of values and ambitions to the pragmatic narrative about the system resistant to internal and external challenges (Shared Vision, Common Action: A Stronger ..., 2016; Vincenti, 2016).

The preparation stage of the EU Global Strategy took place in 2015 together with the strategic review of the High Representative for External Relations and Security Policy Federica Mogherini; it represented five main issues for the EU, namely:

- 1) due to the emphasis on strategic relations only, the dynamics and relevance of the European Security Strategy are lost;
- 2) insecurity with the shared logistical means, intelligence and army is accompanied by dependence on other international actors;
- 3) low level of incentives of the European states regarding the increase in capacity directly affects the growth of the degradation of industry, trade, and defense;
- 4) the participation of foreign aid in management and its standards does not allow directing finances to urgent defense needs and priorities of the European Union's foreign policy, hence financial and political instruments are not prone to flexibility;
- 5) the lack of coordination and policy fragmentation harms the EU role as one of the largest aid donors and reduces its diplomatic activity (Missiroli, Tocci, Mogherini, 2015).

The Global Strategy of the EU, is of a rather blurred and generalized character. According to the assessment of the Global Strategy of the EU, the world of the 21st century faces the challenges of the consequences of globalization, cross-border problems, conflicts and crises in the neighborhood, extremism, escalation of terrorism, and the emergence of a new type of threat, i.e., hybrid, global warming, pollution of the environment, instability of the political and economic system of the state, violation of human rights, health crisis and the insecurity of the energy and digital sectors (Shared Vision, Common Action: A Stronger ..., 2016).

Thus, the EU strategic document from 2016 updates its action plan to more realistic tasks that will be regularly monitored. Subsequently, the priorities of the Community are the protection of the territories and the citizens, and the key vectors of the implementation of the Global

Strategy of the EU are the protection of the Community, a comprehensive approach to conflict stabilization, social and state stability of EU neighboring countries, regional partnership structures and world management in the 21st century (Shared Vision, Common Action: A Stronger ..., 2016).

The review of the strategy took place during 2016–2020, and shows the following:

1) the range of threats is expanding to chemical attacks, propaganda and disinformation and attacks on digital infrastructures. Therefore, in this context, a special achievement is the Hybrid Fusion Cell – a tool for making political decisions based on the rapid analysis of information from various sources;

2) due to irrationality in the distribution of defense finances, the Community spends a lot of money on it, but does not reach the level of the defense union spending;

3) the potential for joint procurement of equipment is not used;

4) the Community is unable to act collectively and in a coordinated manner regarding the stabilization of crisis phenomena and war, the key problem is the lack of consensus;

5) based on the experience of the EU member states, the inefficiency of the UN and international economic institutions is noticeable;

6) The European Union does not expand cooperation with other continents of the world such as Asia or the Middle East (The European Union's global strategy ..., 2019).

In our opinion, the shortcomings of the Global Strategy are as follows:

- the lack of hierarchy of goals blocks the processes of both the strategy and the Common Foreign and Security Policy;

- although the strategy points to a global dimension, it does not take into account external challenges that directly affect the internal security of the EU;

- due to the large-scale range of tasks and the peculiarities of each European state, the strategy does not provide for the establishment of specific tools to achieve the goals;

- the strategy does not set a time frame for the implementation of the tasks, thus, monitoring its progress remains a complicated issue;

- the strategy still does not fix the mechanism for increasing the defense potential and stabilizing the economy in Europe;

- due to the priority of stability and readiness to stabilize crises, there are cases when EU states and institutions do not pay much attention to problems related to the protection of people's rights.

Undoubtedly, the geopolitical context has undergone changes over the past six years. Therefore, the European Union is once more trying to increase its own potential as a global player. It is obvious that the priority of the Community is its military ambitions, which are focused on its own capabilities and partnership resources (Le Gleut, Conway-Mouret, 2021).

The research and preparation of the Strategic Compass began in late 2020 and was completed in the spring of 2022. Thus, to create the third EU strategic document, the so-called "360-degree Threat Analysis" was compiled, which included the intelligence data of individual countries (Questions and answers: threat analysis ..., 2020; Wagner, 2022).

The Strategic Compass intends to clearly describe and capture the concept of "strategic autonomy" in the European defense environment. Subsequently, the plan of the strategic course of the EU from 2022 consists in the flexibility of management in accordance with the set goals (For a European Union that protects ..., 2022, p. 11).

Although the "360-degree Threat Review" is a confidential document, it is safe to assume that the results of this study were included in the Compass section, namely, "The World We Face". This chapter states that the Community faces such challenges as hybrid warfare, cross-border threats, weapons of mass destruction, terrorist acts, health crisis, etc. It is emphasized in the text of the Compass that there is the need for greater responsibility of the Community for the sphere of its protection both internally and externally, as well as the necessity to act promptly and independently, or, if necessary, with partners (For a European Union that protects ..., 2022, p. 17).

Paradoxically, the full-scale war in Ukraine and the subsequent unplanned reviews have led to a more motivated document, where each point is now analyzed mainly from the single dimension, i.e., the place of the European Union in the even larger counterbalance of the superpowers (Wagner, 2022).

The analysis of threats in the Strategic Compass, first of all, emphasizes the need for "hard power" as the necessity for the Community. However, a thorough review of the threats of the first chapter after the escalation of the Russian-Ukrainian war does not indicate a revision of the

recommendations for actions presented in the following chapters (Le Gleut, Conway-Mouret, 2021).

Analyzing the Strategic Compass, David Rickels, the researcher at the European Policy Center, highlights its strengths and weaknesses. In the group of the strengths of the Strategic Compass, he singles out the following (Paul, Shea, Chihaiia, Ciolan et al., 2022):

1) the Compass is an important step towards a strategic culture. For example, the comprehensive assessment of threats has already managed to unite EU member states in the joint strategic work;

2) the inclusive approach of the Compass presupposes a strategic course and a precise plan of action. It sets a specific goal to strengthen the rapid response system by 2025, taking into account both the operational tools and the decision-making method;

3) the role of the European Union as a promoter of the European security and the guarantor of collective resilience (primarily against hybrid threats) is clearly stated in the Compass.

Some of the weaknesses of the Strategic Compass are as follows (Paul, Shea, Chihaiia, Ciolan et al., 2022):

1) the Compass does not correspond to the features of the strategy. The new strategic planning of the EU did not take into account the fact that security also depends on such topics as economy, energy, food, technology, migration and provision of resources in conditions of scarcity;

2) the Compass is not sufficiently focused on geopolitics, for example, on the three maritime hotspots, i.e., the Mediterranean, the Black Sea, and the Baltic Sea. Therefore, we can assume the probable status quo with China;

3) complex and convoluted military ambitions of the Compass. It would be of interest to know what will happen to the defense goal “Headline Goal 2003” (joint armed forces of 60 thousand people in 60 days);

4) during the preparation of the Compass, the EU inter-institutional crisis management system was not reviewed.

In general, Strategic Compass is a new chance for the EU in the area of security and defense. It is ambitious and precise in addressing the known weaknesses in decision-making

processes, structures, capacity and funding which are known to have prevented previous EU strategies from acting swiftly and responsibly.

6. Issues of EU defense initiatives implementation

The success of the EU defense strategy directly depends on the adequate defense structure of the European states, which is able to influence the system of military management and has the appropriate tools to encourage the governments of the states to act as a single consortium, with others, when possible, and autonomously, in case the need presupposes. Below is a detailed look at several of these defense structures for Europe.

Permanent Structured Cooperation on Security and Defense of the EU (PESCO) is a platform for cooperation between European states in the security and defense area, the basis of which is joint projects aimed to increase European defense potential; it began its work on December 11, 2017 (Establishing permanent structured cooperation (PESCO)) ..., 2017; Permanent Structured Cooperation (PESCO)).

On May 23, 2023, the European Union approved 11 new defense projects within the framework of PESCO. These projects joined the 57 already existing within the Permanent Structured Cooperation (PESCO). All of them include training, artillery countermeasures, ammunition, medium helicopters and air-launched missiles. According to Josep Borrell, due to 11 new EU projects, it will be possible to strengthen Europe's ability to conduct high-intensity warfare.

PESCO can be considered as an important mechanism of military integration of EU member states, launched with the aim of achieving significant results for a more effective defense of Europe and ensuring better coordination and cooperation in the areas of investment, capacity building and operational readiness. Hence, further prospects arise, namely, the increased cooperation in these areas will reduce the number of different weapons systems in Europe and, ultimately, increase operational interoperability between EU member states (Dorosh, 2023b, p. 5).

Having analysed the information on the operation of PESCO, we have identified the strengths and weaknesses of this defense structure.

PESCO strengths:

1. *Projects that cover critical gaps.* It is worth considering the following PESCO projects: European MALE drone; early warning and interception based on space surveillance (TWISTER); strategic air transport for oversized cargo (SATOC); and European Medical Command (EMC) (Development, Delivery and Determination: PESCO ..., 2022; Peruzzi, 2022).

2. *Smart Defense cooperation model.* PESCO provides sustainability of commitments, project management and accountability mechanisms. In general, the advantage of this PESCO model is that it managed to integrate such different vectors of states as Germany, Poland and France (Paolucci, 2021).

3. *PESCO Roadmap.* In March 2018, the Permanent Structural Cooperation on Security and Defense of the EU published a separate strategic document, the PESCO Roadmap. The PESCO strategy includes three vectors: 1) growth of PESCO due to the creation of high-speed mobility of the armed forces within the European Union; 2) expansion and establishment of strategic partnership both within the structure and outside it; 3) investing in current defense initiatives, taking into account funding for new military technologies and inventions (Concerning a roadmap for the implementation ..., 2018).

PESCO weaknesses:

1. *Inconsistent achievements and lack of coordination.* Most countries do not distinguish between NATO and PESCO projects, so often the wave of Permanent Structural Cooperation projects on security and defense of the EU is slow, or its certain projects are canceled immediately (Le Gleut, Conway-Mouret, 2019).

2. *Failure to fulfill obligations.* On November 20, 2020, the Strategic Monitoring of PESCO activities was held. The monitoring report highlights the following notable obstacles in the functioning of PESCO: 1) so far, the projects have not received the necessary investments from the participating states; 2) the representatives of the Community institutions do not receive proper review of certain projects (Barigazzi, 2021; PESCO Strategic Review 2020, 2020).

3. *Interaction with other international actors.* According to the new EU defense strategy, dated from 2022, PESCO should establish contacts not only with NATO, but also with the African Union, Norway, Japan, Britain, etc. (For a European Union that protects ..., 2022).

Coordinated Annual Review on EU Defense (CARD). The Coordinated Annual Review on Defense (CARD) provides a comprehensive overview of EU states' defense spendings and investments, including research. This provides the opportunity to have a look at the European defense planning and the development of its capabilities while listing gaps in relation to the CDP (Waard, 2020).

Until now, the CARD reports have not received the attention they deserve. CARD should now serve as the compass to guide the necessary joint development efforts. However, the implementation of such coordination requires specific measures and the use of the Community funds to facilitate the interaction between demand and industrial supply in the Member States. This requires further cooperation to provide the European region with the necessary defense capabilities, since, according to the CARD 2022 report, less than 20 per cent of all investments in defense programs come from cooperation. This leads to the conclusion that defense cooperation remains in the mode of exception rather than the rule (Borrell, 2023).

Due to the detailed analysis, the strengths and weaknesses of CARD were identified.

CARD strengths:

1. *The mechanism of collective defense planning.* The main idea of the CARD is to create favorable conditions for collective European defense avoiding duplication of projects and waste of money. Whereas a similar approach of the Capacity Development Plan (CDP) was invaluable as of 2018. Subsequently, the CARD is a mechanism for implementing the goals of the European defense strategy through the joint defense planning and consultation (Fiott, 2017).

CARD weaknesses:

1. *Predominance of national interests over the Pan-European.* This aspect leads to different priorities, approaches to security and defense of the European Union and is accompanied by the reluctance of the EU member states to share their own defense plans (Report CARD 2020, 2020);

2. *Criticism regarding the regulatory documents.* The representatives of the private sector and national structures criticized the Capacity Development Plan and the CARD 2020 Report. They stated that the identified priorities and capabilities did not take into account their own defense objectives; the six selected CARD sectors are too limited and short-term, and that the reporting documentation is dominated only by defense industry gaps (Reybroeck, 2019).

Having started its work on January 1, **2021**, *European Defense Fund (EDF)* is a long-standing French project supported by Germany. The basis for the European Defense Fund (EDF) began to be prepared back in May 2017 (Establishing the European Defense Fund: ..., 2021).

The European Commission has taken a revolutionary step, since this is for the first time in the history of the existence of the European Union that its money will be used to invest in the European sphere of protection. Although the key innovation of the European Defense Fund is the specific allocation of the Community finances for the defense projects, which is completely unprecedented.

On June 26, 2023, the European Commission announced the results of the 2022 competition for €832 million in funding from the European Defense Fund (EDF) to support 41 joint defense research and development projects in the EU. The selected projects will contribute to the further development of high-quality defense capabilities of the EU in such key areas as naval, land, air, space early warning systems and cyber defense (European Defense Fund: EU to invest..., 2023).

Overall, based on the data, it is possible to highlight EDF's strengths and weaknesses.

EDF strengths:

1. *The center for Defense Expenditures and Incentives of Development.* In accordance with the new EU defense strategy of 2022, the European Defense Fund consists of “windows for defense research” and “windows for the development of defense capabilities”. The goal of the fund, according to the strategy, is to encourage EU states to collectively purchase equipment and, with the help of joint defense research and innovation, to strengthen the European defense technological and industrial base (EDTIB) (For a European Union that protects ..., 2022; The EU's Defense Technological and ..., 2020).

2. *Bonus system.* As per the assignment structure, the amount of the bonus varies as follows: 1) the EU Permanent Structural Cooperation on Security and Defense (PESCO) bonus provides for a 10% bonus for all actions related to innovation and technology projects; 2) mid-cap companies receive a 15% bonus for activity in the EU and 10% outside the EU; 3) the bonus of 77 small and medium-sized enterprises defines a 5% bonus for non-cross-border enterprises in the EU (or outside) and 10% for cross-border enterprises in the EU (or outside). Besides, the

bonus can be doubled (x2%) under special conditions of cooperation (The European Defense Fund (EDF), 2022).

3. *National coordination centers.* The European Defense Fund has a wide network of representative offices, the main activity of which is informational and advisory support of potential partners and investors of the EDF program throughout the entire project cycle. A special pride of EDF is the national coordination center in Norway (European defense fund – performance, 2021).

EDF weaknesses:

1. *Lack of expertise and experience.* Since it is a strategic need for EDF to support cross-border partnerships, it must be able to create and coordinate such relationships. The EDF awareness particularly differs between large and small businesses. The reason for this is the lack of an effective long-term plan that would describe the goals, risks and methods of preventive actions for the participants of EDF joint projects (Ilmonen, 2021);

2. *Not synchronized budgets planning.* So far, the planning periods and budget cycles of the EU member states are different, which is a significant restraining factor for joint acquisition and as a result, the pace of development of military innovations is imperceptible and insignificant (Nádudvari, Varga, 2019, p. 6);

3. *Limited strategic partnership.* When it comes to the EDF's cross-border cooperation, it should meet its specific requirements (three legal entities in three different states, given the invitation of the foundation). Thus, the choice of the partners is a semi-strategic and semi-political decision, which cannot be taken by the industry sector independently, it requires the approval and invitation of the EU member states. Therefore, the potential partners will not be able to submit a request for cooperation on their behalf only and without the invitation from the EDF (Zandee, 2021).

European Intervention Initiative (EI2). EI2 does not contain significant differences from the abovementioned groupings.

The French-led European Intervention Initiative (EI2) is an example of the structure that allows for the formation of a strategic culture and strengthening cooperation with France as the key country in operational commitments (Sjökvist, Frisell, 2023, p. 30(59)).

On May 31, 2023, in his closing speech at the Bratislava GLOBSEC Forum (Slovakia), the French President Emmanuel Macron stated that strategic independence and military sovereignty require industrial efforts. The emptying of the arsenals in recent months has become a clear signal that the EU only owns what it produces. He also noted that it remains clear that some countries are increasing their defense spending to purchase large quantities of non-European goods, which could cause problems for these countries in the future. President Macron emphasized that European states should use this opportunity to increase production in Europe. It was due to this that significant progress was achieved in providing assistance to Ukraine. European standards need harmonization and there are more differences in European than in American standards. Although, at the same time, it is necessary to develop European defense technologies and industrial base in all the interested countries, as well as to deploy fully sovereign equipment at the European level. We need to reduce dependency and continue to build strategic proximity in these joint efforts. Naturally, Emmanuel Macron meant the European intervention initiative, which was launched five years ago, and, in his opinion, remains relevant today (“Vladimir Putin has jolted back NATO”..., 2023).

Thus, based on the analysis, the following strengths and weaknesses of EI2 can be deduced.

EI2 strengths:

1. *The Framework Nations cooperation model.* EI2 is an exclusive and flexible club of the states whose main vision is to promote interoperability and responsiveness. EI2 corresponds to the Framework Nations model functioning on the basis of one national package of capabilities (France) or on the basis of two (United Kingdom of Great Britain and France) (Letter of Intent between the ..., 2018; Novaky, 2018).

2. *Autonomy regarding decision-making.* EI2 keeps its focus on Europe, though its decisions are not subject to NATO and EU structures subordination. While maintaining this type of autonomy, EI2 is open to countries such as Denmark, which does not participate in the EU Common Security and Defense Policy, and the United Kingdom, which left the European Union in 2020 (Mills, 2019).

3. *Exclusive club of the leading armies of Europe.* According to the international ranking of military strength “2022 Military Strength Ranking”, most of the EI2 member states belong to the top 25 armies of the world among 142 countries (2022 military strength ranking, 2022).

E12 weaknesses:

1. *Undermining European solidarity.* The concerns of EU member states about the European intervention initiative (E12) were expressed in the statement that E12 may threaten the values and intentions of the European Union. For one reason, E12 still maintains the rule of participation “by invitation” and does not consider an inclusive approach for all willing European states (Mölling, Major, 2018).

2. *Humble coordination.* E12 is resource neutral and will use already established institutions and military communications systems. The majority of the Europeans do not approve of the targeted increase in investment in weapons, military technology and the involvement of their allies in dangerous missions of the neighboring states (Novaky, 2018).

7. Possible development algorithms in the field of security and defense of the EU: forecasts and scenarios

As stated in the report of the European Defense Agency entitled “What the first Coordinated Annual Review on Defense reveals: CARDS on the table”, “prediction is a much broader shaping of the future than its reality” (Waard, 2020).

Therefore, it is possible to assume the likely algorithms of the development of the European defense events in the world in 2025 as follows:

Scenario 1. Partnership in the defense and security sector. The member states of the Community will maintain partnership relations, taking into account their voluntary nature. Interaction will occur frequently, primarily in special cases. For example, in case of financial failure in the defense sector, the Community will, first of all, use the principle of general economy;

Scenario 2. Collective security and defense. The Community member states will take the first steps towards integration, i.e., greater industrial and financial cooperation in the defense sector and regular participation of a significant number of states in joint projects, missions and operations. The investments in the defense sector will come through the established link between the contributions of the states and the income from the European assets in the military industry market;

Scenario 3. Single European protection. Community member states will achieve deep integration in the Europe's defense sector. Cooperation and solidarity will be the norm, and military capability will be bolstered by the close pooling of both armies and resources. Due to the increase in joint defense spending, the innovativeness and professionalism of the military industry will increase and the Community will rise in the ranking among security promoters (Future of European Defense: reflection paper, 2017).

Obviously, it is almost impossible to predict the course of events in the context of the modern international order, but it is possible to assume, based on the lessons of the past, what needs are to be implemented to guarantee the effective protection of Europe. Therefore, we offer the following set of recommendations:

1. The Security Council of Europe is the necessary governing body that the European Union and its member states must implement to achieve consensus in decision-making.

2. Europe should avoid organizational redundancy in the defense sector, namely, there is no need to create a multitude of defense initiatives that are left as paper tigers. In our opinion, it is worth focusing on one framework of cooperation that will bring coherence in defense planning, innovation and a reliable and operational European army (Headline goal 2003).

3. We must jointly oppose the external aggressor. In this context, civil security plays an equally important role. The methods of protecting the consciousness of European citizens from disinformation and propaganda must be developed together with other military technologies.

Therefore, European protection requires reform and a clear position from the EU member states, i.e., what is what they really need – the autonomy or the protectionism. Considering that the modern approach of strategic autonomy is defined as a long and endless way of implementing European defense potential, the European Union must intensify its joint efforts to prevent aggressors who pose a threat to free societies.

8. Conclusions

Over the decades, the strategic course of the EU has changed three times. The European Security Strategy of 2003 reflected the model of a liberal order (effective multiculturalism) based on the model of the UN Security Council, where the role of diplomacy and in some cases the use of “force” was first of all given way. Consequently, the first strategic document of the EU confirmed that international law is not enough in the fight against financial stagnation, terrorist

threats and conflicts. The 2016 EU Global Strategy took a new level of “strategic autonomy” to protect the Europeans and institutionalize the Europe’s defense sector through individual initiatives, namely, CARD, EDF and PESCO. However, the mechanisms of the EU Global Strategy proved to be insufficient under the influence of Brexit, the health crisis and the Russian-Ukrainian conflict. Thus, starting from the “peace project” to the build-up of “hard power”, the Community has high hopes for the Strategic Compass 2022, which combines the autonomy course and the 2030 action plan, defining its goals based on Europe’s specific military gaps and threats, and therefore aims to intensify the already started initiatives.

It has been asserted that the Permanent Structured Cooperation of the EU on Security and Defense (PESCO) is a forum for the interaction of states and a permanent provider of critically important projects of the European military industry. The most significant shift in the PESCO Roadmap is the “Military Mobility” project, which facilitates military and civilian logistics and has the potential to grow into a “military Schengen zone”.

It was determined that the EU Coordinated Annual Review on Defense (CARD) is a relatively unknown EU defense initiative, though it is the most significant one in the context of the functioning of PESCO and EDF. The CARD cycle is long-term, hence its results are not immediately visible. Besides, CARD is an intergovernmental tool of the EU, involving not much of public participation. This is a key weakness of CARD, which threatens its effective implementation, in case the countries do not provide exclusive information to the European Defense Agency.

It was found out that the European Defense Fund (EDF) is the center of the EU defense spending, which makes it possible to make the right investment decisions, develop a network of coordination centers and, due to the system of bonuses, encourage the states to cooperate in joint defense projects. EDF represents a unique opportunity in the single defense mechanism CARD–PESCO–EDF, thereby covering all the needs of the European defense sector.

It has been highlighted that the European Intervention Initiative (EII) is a French decision independent of the EU and NATO in building a strategic culture and reviving the idea of combat groups. The exclusive participation of the 13 leading armies of Europe is both an advantage in the possible European defense integration (in particular for the participation of the forces of Denmark and Great Britain) and a violation of European solidarity.

Scenarios that predict the development of the EU in the field of defense, despite the difficulties along the way, are considered. It should be understood that after the Russia's full-scale military invasion of Ukraine, the priority of the organization is the protection of the member states and its partners. In the future, the European Union should continue to deepen cooperation in the field of defense and develop its potential in this direction, because it is impossible to predict what events may unfold on the continent in the future, and security is the key to stability.

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