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Dimitrova, A.L.; Gürkan, S.; Koops, J.A.

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Stuck on the stairway of change: the EU's enlargement and security and defence policies post 2022

Antoaneta L. Dimitrova, Seda Gürkan and Joachim Koops

Faculty of Governance and Global Affairs (FGGA), Institute of Security and Global Affairs (ISGA), Leiden University, The Hague, The Netherlands

ABSTRACT

Since the beginning of Russia's full-scale invasion of Ukraine in 2022, the European Union (EU) has taken a number of unprecedented decisions. These decisions and policy measures have involved key EU policies, above all the Common Foreign and Security Policy (CFSP), the Common Security and Defence Policy (CSDP) and enlargement. Has the external shock of the war created conditions for these policies to take a new path? Has the war been a 'critical juncture' for one or both of these policies? This article proposes a 'stairway of change' framework building on institutionalist literature to explore the nature of change. Applying this framework, the article addresses the question of the sustainability and scope of the policy changes in CFSP/CSDP and enlargement by analysing discourses, decisions, policy measures and funding. It is concluded that while there have been significant shifts in these, both policies remain stuck somewhere on the stairway towards sustainable change.

KEYWORDS Critical juncture; Russia's invasion of Ukraine; Common Foreign and Security Policy (CFSP), Common Security and Defence Policy (CSDP); enlargement

The start of Russia's full-scale invasion of Ukraine on 24 February 2022 was an external shock to the European Union (EU) that was met with an unprecedentedly swift initial response. The informal European Council of 10 -11 March 2022 at Versailles stated that 'Russia's war of aggression constitute[s] a tectonic shift in European history' (European Council 2022). Other EU actors named the war an 'awakening moment for Europe' (Borrell 2022a; Michel 2022; European Parliament 2022a). Despite the numerous declarations, and significant decisions from the EU side in the three years that followed (Leuffen *et al.* 2024), it is still not clear whether the war has truly been a critical juncture for the EU.

CONTACT Antoaneta L. Dimitrova a.l.dimitrova@fgga.leidenuniv.nl

This article approaches this question by outlining a theoretical framework that defines the different stages and elements of policy change. The framework is then applied to examine developments in EU enlargement and security and defence policies to establish the extent to which the EU has put these key policy areas on a new path. The main objectives of this article are: first, to contribute to the understanding of dynamics surrounding potential critical junctures for specific policies and second, to understand whether the EU's decisions and responses have taken enlargement and security and defence policies on a new path or whether policy changes are superficial, incremental and easily reversible.

The debate on the impact of the war on the EU is inconclusive so far. Some scholars have argued that the EU and its key policies have already changed after the invasion and that the war constitutes a turning point for the EU (Dimitrova 2023; Fiott 2023; Håkansson 2024; Bosse 2024; Orenstein 2023; Rabinovych and Pintsch 2024; Maurer *et al.* 2024). Others suggest that the invasion in 2022 has neither led to lasting change in the EU's policies nor has it had any substantial effect on European integration or EU policies (Anghel and Džankić 2023; Genschel *et al.* 2023; Heidbreder 2024). Yet others concluded that the invasion had mixed results for the EU with limited effects on the EU's international actorness (Costa and Barbé 2023), but a major impact on EU community building (Freudlsperger and Schimmelfennig 2023; Gürkan 2024). This article contributes to these broad debates by developing the stairway or change framework specifying the nature, scope and significance of policy changes that might constitute a critical juncture and analysing the two policies accordingly.

We are also aware of renewed debates on drivers of enlargement and drivers of change in security and defence policy, for example focusing on EU as a liberal community, geopolitics or values (Schimmelfennig 2002; Sjursen 2002; Anghel and Jones 2022), or on various factors impacting the EU decision to deepen its defence union, such as declining US commitment to NATO and European security under the second Trump administration. While we recognise that these are important questions that are currently revisited, our focus in this article is, however, not on these drivers *per se*, but rather on the sustainability and scope of policy change that allows the detection of a critical juncture.

We chose to focus on the EU's enlargement policy and security and defence for several reasons. First of all, enlargement and security and defence policies are at the heart of the EU's external relations (Koops 2025). Furthermore, both policies have been at the centre of the EU's response to the war and defined much of the Union's interactions with Ukraine. Despite the EU's response to the war involving both security and enlargement and therefore creating some overlap between them, these are policies with distinct treaty bases and significant decision-making

constraints related to unanimity. They are, therefore, hard cases for change and well suited to illustrate the nuances and dynamics of policy elements influenced by external shock. Moreover, before the war, the *status quo* had in these policy areas been preserved for at least a decade with small (enlargement) or mostly symbolic (CFSP/CSDP) adjustments, making the changes triggered by the war both significant and traceable. Until 2022, both policy areas had produced adjusted strategies, methodology and organisational initiatives, especially in CFSP, but they were hardly matched by corresponding policy developments on the ground.

Last but not least, in both cases, policy changes have involved several levels and layers making up policy (discourse, organisational changes, financing changes) in a short period of time. This allows us to illustrate how critical junctures can be studied in a specific manner by focusing on key elements and stages, even as the outcome of the process is yet unclear. Change in these policies will determine the Union's capacity to take on a new role in the international arena and defend its member states against potential further escalation of Russia's revisionist campaign.

Against this backdrop, the article develops a conceptual framework problematising the idea of *critical juncture*, focusing on the precise *nature* of change. When we assess the decisions and measures taken, we focus on the *sustainability* and the *scope* of changes made so far by the EU. Investigating the *scope* of policy changes we refer to the extent to which there are path breaking aspects of decisions in a given policy area: whether decisions break with previous decisions and revise the substance of policy measures or devise entirely new ones. Alternatively, decisions taken can be incremental, following clear path dependent pattern in policy areas.

Speaking of *sustainability,* we refer to whether decisions, policy initiatives, organisational changes and capacity building are becoming institutionalised through higher level adjustments of formal and informal rules. Alternatively, decisions taken after external shock can constitute of mostly rhetorical responses, with no concrete financial or organisational consequences or temporary, transitionary arrangements, responding superficially to external pressures. Sustainability, in our view, can only be ensured if layers of change include not only change of discourses linked to a policy but also different policy decisions, institutions and ultimately, constitutional level changes to modify the decision making contexts in which actors operate. In particular, when constitutional level rules favour stability and deadlock, as is with these two policies, constitutional changes would need to take place to allow for a less constraining institutional foundation for the operation of different policies.

This article is structured as follows: The first section revisits institutionalist approaches to policy change and defines key concepts, including critical juncture. The second section builds on these approaches to develop

a *stairway of change* framework that can be used to detect whether policies have really taken a new path. The following sections apply the theoretical framework to the two cases of enlargement and CFSP/CDSP. To trace the changes in both policy areas, the empirical part relies on the secondary literature and on primary data, namely European Council conclusions, European Commission reports, official speeches, declarations and decisions, and formal statements made on behalf of the EU by the Presidents of the European Commission and European Council, as well as by the HR/VP. Data on spending commitments, training missions and similar aspects are used to detail policy commitments.

Policy change and continuity in institutionalist approaches

Various institutionalist theories have explored path dependence and persistence versus policy change, providing insights we build on to define the stages of change (Tsebelis 2002; Thelen 1999; Pierson 2011; Schmidt 2010; Jones and Baumgartner 2012). Rational institutionalist approaches highlight the importance of veto players and their preference configurations. As Tsebelis (2002) has shown, when policy decision-making involves multiple veto players, a policy can remain in deadlock, until the preference configuration or the decision-making rules change. With this understanding, we can already point to the high threshold for change in our two policy cases, given that they are subject to unanimity decision-making. With high constraints for change (numerous veto players, unanimity), we would expect that sustainable change would involve both informal and formal alterations in institutional rules, as shown by Farrell and Héritier (2003).

Other important insights can be found in punctuated equilibrium theory (PET) that analyses policy changes as incremental, involving small adjustments over time, yet punctuated by more drastic and extensive change, driven by external factors or shifts in issue definition (Jones and Baumgartner 2012; Baumgartner *et al.* 2009). Change in issue definition can be achieved through political rhetoric, but also through new discourses, as discursive institutionalism suggests. Discursive institutionalism emphasises the role of ideas as driver of change, emerging during interactions between actors in a discursive setting (Schmidt 2010). Recent discursive institutionalist studies illustrate how change can be influenced by the political ideas evoked by specific political actors. Such disscursivist analyses view policy as embedded in institutions that can be, to some extent, changed through discursive reinterpretation by specific actors (Crespy *et al.* 2024; Carstensen and Emmenegger 2022),

Historical institutionalism (HI) is the theory that puts critical junctures at the centre, identifying them as key moment of policy change, positing

that at certain pivotal periods key decisions are taken that affect subsequent decisions. Path dependence, the development of a policy along a trajectory determined by some key initial decisions, is a core aspect of HI that has been widely explored in policy analyses, whereas critical junctures are mostly identified *ex post*.

Critical junctures are defined as 'moments of uncertainty when actors can shape the institutions' (Christiansen and Verdun 2020: 4). Collier and Collier (1991: 29) specify critical juncture as 'a period of significant change, which typically occurs in distinct ways in different countries [.] and which is hypothesised to produce distinct legacies'. Capoccia and Kelemen (2007: 348), define critical junctures as '*relatively* short periods of time during which there is a *substantially* heighted probability that agents' choices will affect the outcome of interest'. While the duration of the critical juncture is short, the duration of the processes that it triggers is longer. Furthermore, during this brief moment/phase, agents 'face a broader than typical range of feasible options' and 'their choices from among these options are likely to have significant impact on subsequent outcomes' (Capoccia and Kelemen 2007: 348). We can expect that the war against Ukraine represents a potential critical juncture if it lessens the constraints for policy makers regarding their menu of policy choices. What external shocks may provide are permissive and productive conditions (Soifer 2012) to relax constraints and facilitate policy decisions to set a policy on a new path.

Building on these different insights, the next section presents the stages and elements of policy change that would allow scholars to identify a critical juncture.

A framework for understanding different stages of policy change

As discussed, junctures are hard to recognise *ex ante* and mostly identified long after the initial events that triggered them. To bridge this gap and improve our understanding when a policy has gone through a critical juncture, we need to consider the nature of changes taking place in response to an external shock. Whether actors react at the discursive level only, or whether they commit themselves to a new policy through substantively different decisions, backed by the concomitant resources and organisational structures, makes a difference. For a policy to take a new path, we suggest that the changes made should be both considerable in *scope* and *sustainable* in the medium and possibly long term. We refer to *scope* to denote the significance of policy changes in substantive terms and the effect on actors within the relevant decision-making arena. In addition, we define *sustainable* change as one that embeds the policy in different decision making, institutional and constitutional level rules.

Drawing on the above, we therefore conceptualise the stages of policy change to include the following: 1) change of discourse, i.e. new ideas and arguments that change the issue definition or produce coordinating and communicating discourses that legitimise and operationalise new policy decisions (Schmidt 2008); 2) policy decisions that change the substance of policy; 3) new organisational arrangements are made to facilitate policy actions; 4) new funds created and resources committed to support organisational change; 5) new institutional arrangements are made that support and facilitate the changed policy (below the constitutional level changes); and finally 6) in case of higher level constraints that exacerbate the difficulties of policy change, constitutional level institutional change: either through treaty amendment; or through a landmark decision of the CJEU; or recursive (in)formal change such as the use of trialogues (Farrell and Héritier 2003) that modifes constitutional level rules.

We also integrate ways to assess *the scope of change* that can be measured by the following: 1) decisions depart from previous policy decisions in their substance; 2) relevant actors re-orient themselves to respond to new incentives and constraints (e.g. by participating in new organisational structures, committing funds and personnel); 3) decision making changes to facilitate policy; 4) constitutional level change takes place which ultimately locks in different decision-making rules for a policy (for example unanimity changes to QMV in relevant areas or starts to be used).

The framework comprising these stages we call the ***stairway of change*** (see Figure 1). It is constructed as an analytical tool for comprehensively capturing policy change that may occur in a setting where we can expect a critical juncture, as opposed to normal circumstances, when we can expect incremental changes. The stages we outline in the stairway represent a cumulative process where the steps towards irreversible, sustainable change add over each other over time. In our view, a critical juncture can only be reached if changes entail constitutional level change in rules, either codified in treaty change or modified within the existing treaty frameworks (as for example with trilogues or with extended use of emergency powers under article 122 TFEU). Alternatively, a policy remains at a certain step in the ladder and policy change does not reach levels of significant scope and sustainability.

While constitutional change may be viewed as an ambitious threshold for marking a critical juncture, in its absence, changes remain reversible; all decisions, which place institutional arrangements on new trajectories, might be easily altered; policies may regress, and revert to the *status quo ante*.

In our view, the boxes towards the top of the ladder cannot be 'ticked' before the previous ones have emerged to build on. Like Schmidt (2010)

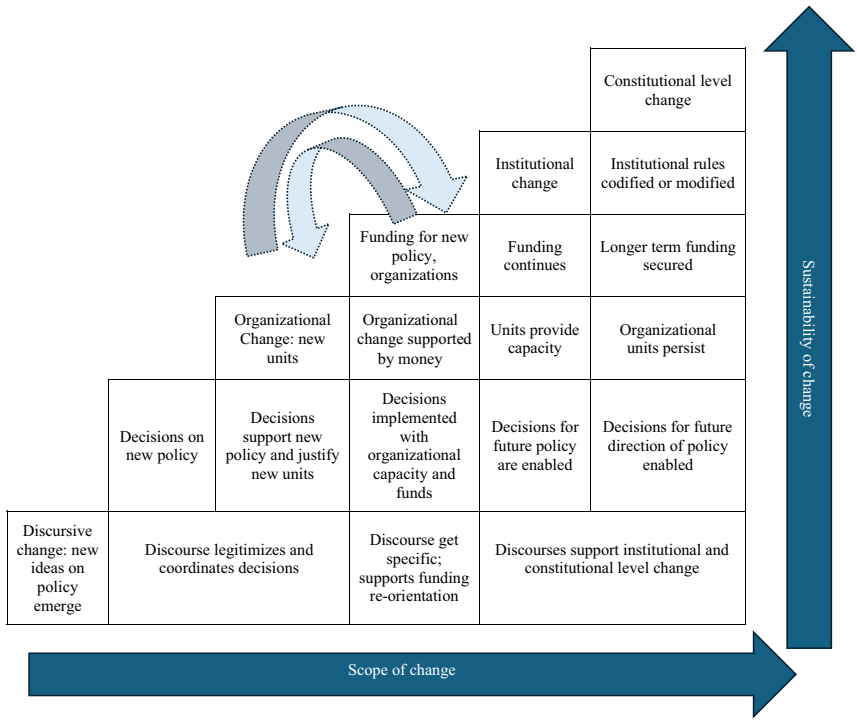

Figure 1. The stairway of change.

we expect that policy and institutional change cannot happen without policy discourses that deliberate on and crystalise new ideas and argumentation. Therefore, we view the change in discourse as important first stage for initiating policy change. Furthermore, throughout, discursive change continues along with policy change, for example in stages 4 and 5 further institutional reform is discussed and specified and the policy discourse becomes more specific to coordinate solutions.

While the levels are cumulative, they can overlap. The only exception would be organisational and funding changes: these two areas can represent different entry points leading to further change based on the opportunity structure and the cycle of EU decision making. For example, for supporting Ukraine, the European Peace Facility (EPF) had already been available when the war started and therefore had been used as a funding vehicle to support Ukraine. This example also shows that funding is flexible to redirect, which makes it less sustainable on its own, without organisational changes and decision making changes.

In order to illustrate the application of the stairway of change in assessing how far a certain policy may have changed on the road to critical juncture, we examine the cases of enlargement and CFSP/CDSP in the following sections.

Assessing changes in the EU's enlargement policy

Pre-2022 developments

The EU's enlargement to the East required the most extensive institutional and policy adjustments from the Union as well as transformations from the candidate states. The Union introduced formal criteria for membership, the Copenhagen criteria, to clarify and supplement existing treaty provisions. In the 1990s and early 2000s, the EU developed conditionality as an underlying principle and tool of the policy, introducing regular reports, monitori\ng missions and suspension clauses and reinforcing the asymmetric character of enlargement negotiations (Dimitrova 2022). Despite the complexity of negotiation and preparation of 12 new member states, most of which were not market economies at the start of the negotiations, the EU's enlargement to the East was viewed as a success (Rehn 2005).

However, already before the completion of the Eastern enlargement, there had been signs that the Union suffered from 'enlargement fatigue'. Societal effects were significant, with increased labour mobility affecting public opinion in the EU's older member states (Börzel *et al.* 2017). The politicisation of enlargement debates became major constraints for further enlargement (Dimitrova and Kortenska 2017). Despite the European perspective provided for the Western Balkan candidates in 2003 and Croatia's successful accession in 2013, there was no significant progress on EU enlargement during the last decade.

Deadlock on enlargement affected both the EU's internal arena – decision-making and preferences of the member states – and the candidate states' ability and willingness to reform (Dimitrova 2022). The Commission proposed an adjustment to enlargement policy (Mirel 2019). The 2020 'revised enlargement approach' meant to speed up the negotiation process by working with clusters instead of chapters. The methodology explicitly aimed to switch from negotiations as a technical process in which the Commission's assessments play the most important role, to a more political process where a central role was envisaged for the Council and the member states and the leaders of the candidate countries (European Parliament 2020: 3). Emphasising rule of law, good governance, and anti-corruption measures as 'the fundamentals' was meant to refocus reforms and restore the credibility of enlargement (European Commission 2020). The proposed change in enlargement policy included a substantially increased funding mechanism (see Mirel 2019) which was, however, rejected by the EU, partly due to Covid-19 redirection of funds. Therefore, the new methodology did not really change the policy substantially. The revisions did not manage to break the deadlock on further enlargement or reforms in the candidate states.

Post-2022 changes in the enlargement policy

After Russia's invasion, enlargement-related decisions were taken very fast, breaking pre-existing taboos in many ways. Five days after the start of the Russian invasion, Ukraine applied for EU membership. Moldova followed suit, applying in March 2022[1]. On 23 June 2022, the European Council granted candidate status to both[2]. The following month, the screening processes with Albania and North Macedonia were officially opened, ending the dormant phase in these countries' accession process[3]. In December 2023, the European Council granted Georgia and Bosnia and Herzegovina candidacy status under specific pre-conditions.

Not only the speed, but also the nature of these decisions was unusual as, with Ukraine, it was the first time the EU decided to start negotiations with a country facing a large-scale, active war. This was also the first time the EU accepted candidacy of a country that shares neither land nor sea borders with the Union, Georgia. However, the question of whether these changes observed after the start of the war constitute a 'critical juncture' for enlargement remains open. The next section will trace whether the main steps of change, in both sustainability and scope dimensions, are present in the EU's approach to enlargement after the war.

Stages of change

Shift in discursive framing/legitimisation and ideas. Policy change started with a discursive shift in the EU's framing of enlargement. Since the start of the war, two main frames have emerged in EU argumentation in favour of making Ukraine part of the enlargement process: values/identity and geopolitics: First, in the EU's framing of enlargement, the weight shifted from arguments about technical and economic preparedness of candidates to ones about shared values and belonging to the EU. Immediately after the start of the invasion, Commission President von der Leyen stated: 'Ukraine is one of us and we want them in the EU' (Euronews 2022). In the same vein, the informal summit of the European Council in Versailles in 2022 stated that 'the European Council acknowledges the European aspirations and European choice of Ukraine. […] Ukraine belongs to our European family' (European Council 2022). In February 2024, President von der Leyen reaffirmed that Ukraine and the Western Balkans 'belong to the European family' (von der Leyen 2024). Virtually all high-level representatives of the EU institutions contributed to and reinforced this discourse, also emphasising that 'Ukrainians fight for our common values' (European Parliament 2022a). The changed perception of Ukraine in EU circles was also confirmed in the way Ukrainian refugees were received and integrated in Europe compared to previous refugee flows of people with origins outside of Europe (Jauhiainen and Erbsen 2023).

A second set of arguments that emerged in the EU's framing of enlargement referred to the geopolitical imperative or geopolitical necessity. Although values, at least symbolically, continue to be a priority for the EU, the rhetorical linkage between the enlargement agenda and the EU's security priorities has added an urgency to the EU's enlargement-related decisions. The following statement from the HR/VP captures this:

> On the EU side, we should be clear that enlarging the EU with those countries willing and able to meet the conditions is not a 'favour' or a concession. It is in our strategic interest. […] A credible enlargement policy is a geostrategic investment in peace, stability, security and economic growth in the whole of Europe (Borrell 2022b).

However, the EU had spoken of uniting the continent already in the run-up to the big-bang enlargement in the 2000s. These strategic arguments do not represent an abrupt change from institutional statements predating the war, but rather build on them:

> In times of increasing global challenges and divisions, it remains more than ever a geostrategic investment in a stable, strong and united Europe. A credible accession perspective is the key incentive and driver of transformation in the region and thus enhances our collective security and prosperity. (European Commission 2020)

In sum, the discursive framing of the enlargement as a geopolitical necessity and a moral obligation for Europe is similar to previously mentioned geopolitical considerations and approaches to enlargement. However, while geopolitical aspects are not new arguments affecting enlargement decisions, their use for opening enlargement perspectives to Ukraine, Georgia and Moldova can be considered as a shift from the pre-war period because of the EU's previous exclusion of these countries from enlargement (Dimitrova 2023).

Opening debates about institutional reform. The enlargement as a geopolitical necessity frame has also revived debates about EU institutional reform and decision-making structures. The European Parliament (EP) was one of the first institutions to contribute to this debate with its resolution of June 2022 calling on the European Council to start the process of revising the EU treaties (European Parliament 2022b). The resolution involved proposals ranging from reform of Council's voting procedures, switching from unanimity to QMV and use of the Lisbon treaty passerelle clauses. Again, reforming the EU with a view to preparing the Union for enlargement was framed as a geopolitical necessity (Borrell 2022b).

EU member states also started to address the question of institutional reform for preparing the Union for potential enlargement. Under the Swedish Presidency, in the first half of 2023, discussions focused on a 'pragmatic' reform programme with changes in key areas such as CFSP, CSDP, among

others, that would not require treaty change. In May 2023, nine member states formed the Group of Friends on Qualified Majority Voting (QMV) with a view to improving the 'effectiveness and speed of foreign-policy decision-making' in CFSP and 'preparing the EU for the future'.[4] An EP Research Service study clarified the possibilities of proceeding with less unanimity, presenting an inventory of all the options of extending the use of QMV in foreign policy in existing treaties (Navarra *et al.* 2023). Next, a Franco-German report[5] from September 2023 outlined scenarios with far-reaching proposals. The report explicitly linked the EU's deepening and widening, and suggested comprehensive reform options for the EU institutions, considering the prospect of 10 new members joining the Union.

As these various initiatives and documents illustrate, since 2022 the prospect of enlargement has initiated a serious reflection on institutional reform. Similar to the EU's successive treaty reform debates in the 1990s and 2000s, proposals for reform are formulated in connection with the EU's enlargement prospect. Member states responses to these proposals are, however, uncertain. Currently they are limited to the conclusions of the Granada Declaration of the European Council (2023) that stressed that enlargement and reform should proceed in parallel.

Funding and commitments. With the chain of decisions granting candidate status, Ukraine, Moldova and Georgia started to benefit from pre-accession funds for assisting their preparation for membership, including support for civil society, opposition as well as economic development (Anghel and Džankić 2023: 487). In the case of Ukraine, from the start of invasion to 2024, the EU has 'mobilised around €9.5 billion to support Ukraine's overall economic, social and financial resilience in the form of macro-financial assistance, budget support, emergency assistance, crisis response and humanitarian aid' (European Commission 2024). While the European Peace Facility (EPF) was used to fund military deliveries to Ukraine with €2.5 billion allocated by 2024, the Ukraine Facility, launched in June 2023 was created for long term support for Ukraine during the war as well as in view of the accession.[6] The Ukraine Facility involves commitments of €50 billion for the period from 2024 to 2027 across three pillars closely related to Ukraine's preparedness for accession. At the Ukraine Recovery Conference in June 2024, the Commission announced the signature of €1.4 billion in new guarantee and grant agreements to support Ukraine's recovery and reconstruction and signed new Technical Assistance programmes worth over €100 million to support Ukraine's reforms (European Commission 2024).

The allocation of extensive financial support and assistance in such a short period of time not only exceeds the EU's previous financial commitments to Ukraine, but it is also higher than any other type of support to any other candidate in the pre-accession process so far.

Scope and sustainability of change in enlargement policy

Decisions departing from previous policy decisions. Our indicator of the scope of change tracks whether decisions differ significantly from previous ones. Ukraine, Moldova and Georgia's relations with the EU had previously been governed by the EU's Neighbourhood Policy (ENP). Despite these countries' close relationship with the EU through the Eastern Partnership (EaP) and their comprehensive association and trade agreements with the EU, they were left outside the scope of the enlargement process, in contrast to Western Balkan candidates. Indeed, EaP was the 'the burial ground for enlargement hopes' (Verdun and Chira 2011: 448). Furthermore, before the war member states were constrained by public opinion about closer relations with Ukraine. The negative result of the consultative referendum held in the Netherlands in April 2016 on the Association agreement with Ukraine showed that the issue was easily politicised among citizens, and where the red lines were for bringing Ukraine closer to the Union (Dimitrova and Dragneva 2023). In short, until 2022, the prospect of membership for Ukraine, Georgia and Moldova was non-existent.

The war eased political constraints on decision-makers, opening the door for the EU to offer the prospect of membership to Ukraine. We consider this move as a radical shift from earlier decisions for two reasons: First, the decision to grant the status of candidacy alters the EU's previous approach to these countries, upgrading their status from 'neighbours' to 'potential members'. As the accession framework replaced the ENP/EaP, the EU's logic and discourse in approaching these countries shifted from 'creating a ring of friends' to 'creating one of us. Second, the content as well as the extent of reform expectations from these countries have changed. While the geopolitical rhetoric – about why Ukraine, Georgia and Moldova should be included in the EU's enlargement - might echo previous rounds of enlargement, EU actors' decisions, their speed and content attest to a major shift in terms of the substance of change. While these steps suggest a different path compared to pre-2022 path for enlargement, the sustainability of change remains in question. So far further progress stumbles against the obstacle of unanimous decision-making and lack of appetite for treaty reform.

Assessing changes in security and defence

Pre-2022 developments: CDSP, discourses, policy measures and missions

During the first two decades since its formal creation in 1999, the EU's Common Security and Defence Policy (CSDP) experienced significant ebbs and flows. Javier Solana, the EU's first High Representative (HR), pushed for developing the CSDP, previously known as the European

Security and Defence Policy (ESDP), at a remarkable pace. Within just two years, in 2003, he presented the EU's first ever European Security Strategy (Council of the European Union 2003). The EU launched its first four military operations in the Balkans and on the African continent between 2003 and 2008 (Grevi *et al.* 2009). However, CSDP hyperactivity slowed down significantly in the succeeding decade (Koops and Tercovich 2020). The following period between the publication of the EU Global Strategy in 2016 and February 2022 is often described as a one of multiple security and defence ideas and initiatives – including innovations such as Permanent Structured Cooperation (PESCO), the Coordinated Annual Review on Defence (CARD), the European Defence Fund (EDF) and debates on EU 'strategic autonomy' (see Fiott 2020). Yet these developments did not constitute a major or fundamental shift in the EU as an international security actor as strategy stayed far ahead of policy realities (Major and Mölling 2020).

Until 2022, the EU's security policies towards Russia were rather reactive and largely affected by Russia's tendency to push for bilateral relations instead of EU level ones (Juncos and Pomorska 2021: 558; Ikani *et al.* 2020). The EU's Security Strategy of 2003 referred to Russia as a 'strategic partner'. Remarkably, neither Russia's war against Georgia in 2008 nor Russia's annexation of Crimea in 2014 immediately led to a major shift in threat perceptions and actual policies. Indeed, in 2008 the EU's dependence on military assets from outside led to the absurd situation that the Union criticised Russia diplomatically over its military activities in Georgia whilst at the same time having to rely on Russian military transport aircrafts for transporting EU troops for the EUFOR Tchad/RCA operation. As a result, the EU even officially invited the Russian Federation to take part in the CSDP Military Operation (Council of the European Union 2008). Thus, the EU's reaction to Russia's military aggression against Georgia paradoxically coincided with enhanced cooperation between the EU and Russia in the CSDP realm (Koops 2011: 381). The Union's response to Russia's annexation of Crimea in 2014 – whilst less cooperative than the 2008 response - mostly consisted of diplomatic statements and the introduction of sanction packages against companies and individuals, including travel bans and asset freezes (Council of the European Union 2014). The scope and severity of sanctions were initially limited by member states' reluctance to accept the economic consequences (Juncos and Pomorska 2021: 558).

We note, however, that the shift in the EU's official discourse in the period since 2014 has been very slow and gradual – in line with the increase of Russian threat posed to the European security order. At the time of Russia's invasion of Georgia, the EU's security discourse was still rooted in a rejection of power politics:

> because of our post-modern DNA, the EU is not well-placed to respond to something that might look like "great power politics". There is no alternative to cooperation with Russia on a wide range of issues. The best way to do so is through agreed rules (Solana 2007: 4).

Even after Russia's annexation of Crimea in 2014, Solana's successor – Catherine Ashton – noted that she had difficulties to get EU member states to accept the wording 'Russia's invasion' instead of 'Russia's aggression' (Ashton 2023: 313). Two years later, HR/VP Mogherini, however, signalled a further sharpening of the discourse in the EU's Global Strategy of 2016:

> Managing the relationship with Russia represents a key strategic challenge. A consistent and united approach must remain the cornerstone of EU policy towards Russia. Substantial changes in relations between the EU and Russia are premised upon full respect for international law and the principles underpinning the European security order' (Global Strategy 2016: 33).

Ambiguity persisted: even though 'Russia's violation of international law and the destabilisation of Ukraine' (idem) were explicitly mentioned, the EU's discourse still preserved its cooperative language by stressing interdependence and the need to cooperate with Russia (idem).

In terms of policy substance related to CSDP operations, prior to 2022, EU member states explicitly rejected a Ukrainian request to deploy an EU military CSDP operation in response to Russia's annexation of Crimea and given the military activities in Donbass. Several EU member states viewed such a deployment as an unacceptable provocation or crossing of political red lines for CSDP (Nováky 2015: 251). As a compromise, the Council approved the launch of a civilian advisory CSDP mission in Ukraine in 2014 (EU Advisory Mission for Civilian Sector Reform in Ukraine, EUAM) with a strictly limited (civilian) mandate, excluding the training of military personnel.

Regarding CFSP's classical instrument of sanctions, even though several additional sanction packages were agreed on in subsequent rounds between 2014 and 2022, including bans on export on military and dual use equipment, the initial sanctions were considered too 'soft' and insufficient to have any meaningful deterrent or punitive effect on Russia (Sanus, Akgül-Açıkmeşe and Karaoguz 2024: 10).

When it comes to the overall financial, planning and strategic aspects of the EU's security and defence policies prior to 2022, they remained still modest. Before 2022, Russia–Ukraine crisis did not trigger a broad reversal of previous defence spending declines across Europe. Neither were there significant changes in EU strategy and capabilities (Schilde 2017). In terms of financing of CSDP, costs mostly lay where they fell – i.e. those member states taking part in CSDP operations also had to

finance the lion share of the costs without a substantial common budget.[7] However, as mentioned above, the introduction of the European Peace Facility (EPF) in 2021 allowed for enhanced funding to EU operations and security initiatives in partner countries under the CFSP umbrella. Crucially, the EPF was initially only set up for the financial support of non-lethal military aid and excluded the transfer of weapons and had an upper ceiling of 5 billion Euros for the 6 years financing cycle.

Post-2022 developments in CSDP

After the start of the war, we observe fundamental changes in security discourses, in general terms and specifically towards Russia, but also institutional changes and key decisions by member states as well as financial commitments.

Stages of change

Shift in discourse and ideas. While geopolitical or hard power intentions of the EU were already pronounced in the Global Strategy in 2016, a more substantial change can be identified after 2022. The EU changed its discourse on geopolitics and international threats in parallel with the shift in threat perception, identifying Russia as a clear threat to European security (see Strategic Compass 2022). The new EU policy discourse aimed to shape and coordinate policy responses and to show unity. Whilst the history of CFSP since its beginnings is full of references to geopolitics, there was, for the first time, a sustained and coordinated discourse focused on a threatening geopolitical environment and the need for the EU to become a serious hard security actor (Koops 2025). Scholars and policy makers invoked 'the EU's responsibility to act' (Maurer *et al.* 2023).

Almost every single speech since 2022 includes a reference to a more dangerous international environment marked by geopolitical rivalries and the need for the EU to adapt to this reality (see Borrell 2024). The EU's discursive response to the war and references to Ukraine in the conflict went so far that they nearly mirrored rhetorical action from the Ukrainian side (Leuffen *et al.* 2024: 9). In terms of changed threat perception, rather than being viewed as a 'partner', Russia is now identified – and increasingly referred to – as the EU's principal, and more recently, 'existential', security challenge (European Council 2025, para 11). Generally, the extent of the shift has been noteworthy not only regarding perceptions of Russia, but also in terms of the EU's self-narrative increasingly changing from 'principled pragmatism' towards becoming a hard security actor.

Organisational and institutional changes. If we compare the EU's response in terms of sanctions pre-2022 (i.e. the response to February 2022 compared to March 2014) the scope, substance and comprehensiveness of the 17 sanction packages[8] also indicate a clear shift in approach. Not only are the EU sanctions more far-reaching, but crucially, they now include the sensitive energy sector and oil and gas sanctions and disinvestments – a decision that was lacking in the EU's 2014 response. In this sense, 2022 marked a change in the substance of key decisions, yet sanctions developments may be considered incremental, building on the response of 2014.

Further major changes occurred in relation to CSDP, both at the EU member state level and at the EU-institutional level. As a reaction to the invasion, the Danish government decided to hold a referendum to reconsider its 30-year-old opt-out from CSDP. The referendum of June 2022 resulted in a resounding 'yes' vote for abolishing the opt-out, paving the way for Denmark to join CSDP and the possibility of joining EU military missions (Henley 2022). Denmark's change of position regarding CFSP is significant, because security and defence have always been highly intergovernmental and rely on the member states for their effectiveness. All else being equal, when member states security interests converge, EU's security policies have been stronger (Hix and Høyland 2011: 326–327).

At the EU level, the war against Ukraine has led to historical change in policy decisions regarding military missions in Ukraine. Not only did the Council approve the creation of the EU Military Assistance Mission in support of Ukraine (EUMAM Ukraine) but with it, it also created, for the first time, a military training mission carried out in different locations within EU member states rather than, as previously practiced, outside the EU. In previous cases, EU training missions would be deployed in the target country (e.g. Mozambique, Mali, Somalia, Niger, etc.) and train military staff in non-lethal aspects on the ground (van der Lijn *et al.* 2022). EUMAM is decidedly different in that it includes lethal training and training of Ukrainian military staff in EU member countries themselves (Ostanina 2023).

Intensive military training of the Armed Forces of Ukraine, including the Territorial Defence Forces, have taken place in Poland and Germany and has been coordinated by the Director of the EU's Military Planning and Conduct Capability (MPCC), the latter created in 2017 as a permanent operational headquarters for EU CSDP operations. Whilst the creation of the MPCC represented an institutional innovation already before 2022, the fact that EUMAM is directly coordinated and run by the EEAS' MPCC might lead to further advances in the operationalisation and organisational refinement of MPCC procedures towards an EU operations headquarters for executive operations and missions.

Finally, the creation of a Commissioner for Defence and Space represents a significant institutional innovation. Whilst this new portfolio and new Commissioner Kubilius will not gain full competence over the EU's entire security and defence pillars any time soon (as this would require treaty change) it is nevertheless a major institutional change.

Funding and commitments. The financing mechanisms of the EPF were decisively adapted in March 2022 to allow, for the very first time, the financing of lethal military equipment to a country in an ongoing conflict. Remarkably, this not only transversed the red lines of EU CSDP financing, but also national regulations and laws (such as Germany's armament export laws) restricting the export of weapons to ongoing conflict zones. In terms of institutional dynamics and intergovernmental processes, EU negotiations over the swift adaptation of the EPF also exemplified the possibility of the use of 'constructive abstention' by member states who saw the adaptation as a step too far, but did not want to stop the process for the EU. In February 2022 Austria, Malta and Ireland invoked Article 31 of the Treaty on European Union to express their reservations, but let the changes go ahead without holding up the process (Council of the European Union 2022).

In terms of overall mobilisation of finances for EU security and defence support to Ukraine, the post-2022 decisions by EU member states and institutions also indicate a sped-up and more ambitious approach. Between 2022 and 2024, the EU mobilised 11.1 billion Euros under the EPF to support the Ukrainian armed forces. In March 2024, the EPF was further enhanced with an 'Ukraine Assistance Fund' (UAF) (Council of the European Union 2024). The UAF provides an additional 5 billion Euros to lethal and non-lethal military aid to Ukraine and a more predictable, dedicated financing tool under the EPF and is legally embedded within the CFSP. In addition, it has been explicitly linked to a 'buy European' clause that further nudges European member states to accelerate the development of own industrial base for defence and military equipment 'in line with the recently adopted European Defence Industrial Strategy (EDIS), which aims to strengthen the readiness of the European Defence and Technological Industrial Base (EDTIB) to respond to the new geopolitical security environment caused by Russia's invasion of Ukraine' (Genini 2024). At the time of writing, the 'EPF's global ceiling … totals over €17 billion in current prices for 2021–2027, including €11.647 billion approved for Ukraine' (Bilquin 2024). More recently, in May 2025, in the face of growing geopolitical uncertainties, the Council adopted an additional financial instrument (up to €150 billion loans) to support Member States seeking to increase their investments in defence industrial production through joint procurement (Council of the European Union 2025): the

Security Action for Europe (SAFE)[9]. These developments mark a substantial shift in EU security policy financing.

Scope and sustainability of change in CSDP

The overview of discursive shifts, key decisions, organisational changes and funding commitments, as well as emerging debates regarding treaty change to include both security and defence suggests that the EU has moved quite rapidly along the stairway of change, towards policy shifts of considerable scope and sustainability. Most notably, the EU's security and defence discourse has widened and deepened, highlighting the need for the EU to become a 'geopolitical actor' (Koops 2025). Beyond this discourse there have been policy innovations at the level of CSDP operations, the CSDP opt-in of Denmark, substantial ramping up of sanctions and financing (stretching the limits of treaty-based restrictions) and the introduction of a new dedicated Commissioner for Defence. These developments can be seen as significant organisational and decision-making stages of policy change in CFSP/CSDP. However, the response to the 2022 invasion has not yet affected substantially decision-making for CFSP, or some member states' (Ireland, Austria, Malta) neutral stance. Unanimity rules in CFSP/CSDP decision-making still prevail and an emphasis on creating coalitions of the willing, away from the constraining rules of CFSP/CDSP, can be observed in 2025.

Conclusions

This article presents a general framework for capturing and systematically analysing critical junctures and degrees of change in EU policies. Having observed that critical junctures and turning points are often announced, but rarely understood until long after a certain event or external shock, with this framework we aim to contribute to the theoretical discussions of critical juncture as well as the understanding where key EU policies stand at present.

We argued that critical juncture can be detected by analysing whether a policy has been set on a new path through changes that make it different in substance, with new organisational and financial arrangements, building on discursive shifts and including institutional and ultimately, constitutional level changes that lessen constraints for future decision making. Having incorporated these aspects in our stairway of change framework and specified the conditions of scope and sustainability, we engaged in an analytical exploration of two policy areas. The comparison of where enlargement and security and defence policies stand at present shows similarities in the substantial shift of key policy discourses. These

changed discourses are also noted by many scholars assessing the policies since 2022 (e.g. Anghel and Džankič 2023; Koval and Vachudova 2024). Policy decisions in both policies have also exhibited clear difference in substance with the pre-2022 status quo. Even though a number of key initiatives emerged in security and defence already since 2014, such as the Global Strategy (2016) and PESCO (2017) our analysis suggests that progress in substantive terms, for example in missions or defence procurement was much weaker than at the rhetorical level. On the other hand, in the post-2022 period, key developments, such as the new Commissioner post, represent changes at the decision-making and institutional levels and can therefore be viewed as going beyond discourses and rhetoric. Yet, being below the constitutional level, changes are not irreversible and have not fully solved the persistent problems and challenges that are part and parcel of an intergovernmental CFSP.

In enlargement, attempts made to chart a new path in 2020 with the new methodology had limited effect because negotiations with Western Balkan candidates had been barely progressing. After the start of the war, the push from Ukraine, Moldova and Georgia and the overall geopolitical instability made a real difference for re-starting enlargement. Western Balkan candidates have received candidate status or started negotiations. An unprecedented level of funding has been committed to Ukraine to support its accession process, separately from funding supporting defence. However, enlargement reached only the stage of funding and organisational change, while institutional change is still obstructed by veto players. Therefore, while enlargement decisions have had unprecedented scope, they have not reached far enough on the ladder in terms of sustainability. With security and defence, on the other hand, both scope and sustainability are a step higher, reaching the level of institutional change. In both policy areas, there is no constitutional level change yet, which suggests policies have not undergone a critical juncture in our understanding.

In line with our initial theoretical discussion, both policies continue to encounter constitutional level constraints, namely, decision by unanimity specified in the treaties. With security and defence, there are some possibilities of constitutional level rules being changed without treaty change, by using certain provisions in the Treaty of Lisbon, but even these remain unused. With enlargement, attempts to initiate treaty change have faced the same high constitutional threshold, but some informal rules may see changes in the coming years.

These findings are in line with recent literature assessing the impact of the war on the European Union, which suggests that the Russian invasion has been a 'critical turning point' for the EU's policy advancements (Genini 2025; Maurer *et al.* 2024) and that the EU has been 'coming of age' in terms of increased decision-making ability and a stronger foreign policy

identity (Riddervold and Rieker 2024). Yet, our findings also support scholars who point out that these developments fall short of more substantial changes, such as the 'edification of a more supranational constitutional architecture – characterised by streamlined voting mechanisms, centralised financial resources, and defence competences' (Genini 2025: 43).

We take these discussions further by analysing on the stages of policy change as a response to external shock. While scholars have so far focused on factors facilitating or constraining the EU's response to the war in different policy domains (Anghel and Džankič 2023; Heidbreder 2024) and the implications of this response for European integration (Genschel *et al.* 2023), this article offers a step-by-step analysis of changes. This allows scholars and policymakers to trace where exactly on a ladder of scope and sustainability the policies are and which additional steps may be needed for less easily reversible adaptations.

We recognise that, in the post-2022 period, enlargement and security policies are seen as interrelated and driven by a single overarching logic by some scholars and policy makers. This interdependence might potentially enable or constrain actors' decisions in ways which do not follow the logic of change for a single policy domain. While the potential impact of such interdependence on actors' preferences requires further investigation, the strength of our contribution lies in identifying the elements of a critical juncture in terms of sustainable change of considerable scope and in demonstrating how far towards a critical juncture have discourses, organisational and financial aspects and institutions progressed at present. Future research could apply this analytical framework to assess developments in other policy areas.

Notes

1. Georgia applied for EU membership in March 2022 together with Moldova but was only granted candidate status in December 2023 due to domestic political developments.
2. In June 2022, the Commission's opinion outlined seven steps which Ukraine needed to take in order to progress on the path to the EU. On 14 December 2023, European Council decided to open accession negotiations with Ukraine.
3. 'Eight and 17 years, respectively, had passed between this decision and the moment when the two Western Balkan (WB) states were granted candidate status' (Anghel and Džankić 2023, 487).
4. See Joint Statement of the Foreign Ministries (2023).
5. See Franco-German Working Group (2023).
6. The Ukraine Facility was officially created on 29 February 2024 following interinstitutional negotiations between the European Parliament and the Council. In addition to this, under the Union Civil Protection Mechanism, the EU mobilised in-kind assistance worth €425 million.

7. At the time the common funds were handled through the ATHENA reimbursement mechanism, capped at 10% of common costs.
8. The EU adopted 17 sanction packages against Russia between 23 February 2022 and 20 May 2025.
9. At the time of writing, the European Parliament's Committee on Legal Affairs (JURI) unanimously rejected the fast-tracking of the SAFE loan due to the European Commission's use of Article 122 TFEU as the legal basis for the Regulation. This procedure bypassed the Parliament's involvement in the decision-making process. However, the EP does not oppose the content, but rather the legal basis of the Regulation (EUNews 2025).

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Notes on contributors

Antoaneta L. Dimitrova is Professor of Comparative Governance at Leiden University's Institute of Security and Global Affairs and Head of the Diplomacy and Global Affairs Research Group. She works on European Union enlargement, with a focus on dilemmas of enlargement, decision making, EU reforms and the candidacy of Ukraine. She is also interested in protests and democratic backsliding in Central and Eastern Europe. Her most recent project is NET-ROL: Networks and rule of law: uncovering socio-economic outcomes, a collaborative project funded by the EU's Horizon programme. [a.l.dimitrova@fgga.leidenuniv.nl]

Seda Gürkan is Assistant Professor of European Studies and International Relations at Leiden University's Institute of Security and Global Affairs (ISGA). Her teaching and research interests include EU foreign policy (with a focus on the autocratization processes in the EU's Eastern neighbourhood, enlargement, and EU–Turkey relations), European security and diplomacy, parliamentary diplomacy (European Parliament), and emotions in European policies and politics. [s.gurkan@fgga.leidenuniv.nl]

Joachim Koops is Professor of Security Studies at the Institute of Security and Global Affairs (ISGA) at Leiden University's campus in The Hague. His research focuses on Global Security Governance and the European Union's foreign and security policies, the role of the United Nations, European Union, NATO (and their inter-organisational relations) in peace and security as well as crisis management, peacekeeping, the responsibility to protect (R2P) and the changing nature of diplomacy. In addition, he is interested in issues of academic diplomacy as well as higher education innovation and reform. [j.a.koops@fgga.leidenuniv.nl]

ORCID

Antoaneta L. Dimitrova http://orcid.org/0000-0002-7592-0587
Seda Gürkan http://orcid.org/0000-0003-4971-9537
Joachim Koops http://orcid.org/0000-0002-5107-5067

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