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Research in Social Change

STRENGTHEN EU/NATO RELATIONSHIP: A NECESSITY, NOW MORE THAN EVER

María Isabel Nieto Fernández*

Universidad Complutense de Madrid, Spain

Abstract

This study aims to analyse the evolution of the relationship between the European Union (EU) and the North Atlantic Treaty Organisation (NATO) in the recent decades, particularly with the implementation of the EU's Common Security and defence Policy (CSDP). This study also aims to improve knowledge of the trends of different approaches in the EU about this relationship. Strengthening the cooperation in the field of security and defence is vital for the EU, considering the implications of the Russian invasion of Ukraine and the current hostile international environment, with increasing geopolitical competition between the great powers.

Keywords

EU • NATO • EU/NATO relationship • strategic compass • strategic concept

1. Introduction

The European Union (EU) and North Atlantic Treaty Organisation (NATO) have been cooperating for decades, and not always in a favourable context when it comes to transatlantic relations. With the departure of the Trump administration – period that strongly challenged the strength of the transatlantic link – and the entry of the Biden administration, it seems that these relations have been normalised to some extent. Today, we can say that in an unpredictable world with high geostrategic competition, the instability of our neighbourhood, the aggressive and imperialist attitude of Russia, and the increasing threat of freedoms and democratic regimes in the face of the advance of authoritarianisms, the EU is not able to provide security for Europe. On the contrary, NATO, whose key objective is to ensure the collective defence of its member countries, has become even stronger as the fundamental security provider in our continent. In fact, both organisations have reinforced their collaboration since 2014 after Russia's first aggression to Ukraine, which ended with the illegal annexation of Crimea, and today, this collaboration is passing a hard stress test with the current invasion in the east of Ukraine.

The last chapter of the unprovoked and illegal invasion of Ukraine by the Russian military forces (let us remember that we are talking about the largest European territory whose territory is entirely in our continent), started on February 24, 2022, has escalated up to the point that today, Russia is threatening the world with a global conflict. In little more than 5 months, the situation in the conflict scene has evolved very quickly and has gone from a first attempt by Vladimir Putin to overthrow the democratically elected Ukrainian government and its leader, Volodymyr Zelenskyy, replacing them with a puppet government, to a humiliating retreat in the fight for the courageous resistance of the Ukrainian people. At present and after a reorganisation of the Russian forces and a reassignment of its objectives, the epicentre of the war, which is developing in the long term, is located in the eastern part of the country. The situation is very difficult for Ukraine, which, for now, has the relevant but limited support and assistance of the NATO member countries, which are providing to this country an increasing amount and relevance of military supplies: the military aid from the United States has so far exceeded 8.2 billion dollars (exceeding the total of the rest of donors) and, apart from the aid supplied by its member states, the EU itself plans to approve an additional 500 million aid in weaponry to be added to the billion already given while this lines are being writing, in July 2022. However, the outcome of this conflict is yet to be determined. Putin warned in the second week of July that 'Everyone should know that we have not yet started anything seriously' (Agencia EFE 2022).

The diplomatic path seems dead, and Zelensky himself – the standard-bearer of the free world – has refused to exchange

*Corresponding author e-mail: minieto@ucm.es

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the Ukrainian territory for peace. 'The Russian Federation is the most significant and direct threat to Allies' security and to peace and stability in the Euro-Atlantic area. It seeks to establish spheres of influence and direct control through coercion, subversion, aggression, and annexation. It uses conventional, cyber and hybrid means against us and our partners. Its coercive military posture, rhetoric, and proven willingness to use force to pursue its political goals undermine the rules-based international order. The Russian Federation is modernizing its nuclear forces and expanding its novel and disruptive dual-capable delivery systems, while employing coercive nuclear signalling. It aims to destabilize countries to our East and South' (NATO 2022).

Going back to the historical origins of both organisations, incipient links between the EU and NATO date back to the very first years after the Second World War (WWII) and as a clear consequence of it. The signature of the Treaty of Brussels in 1948 stablished the creation of the Western Union (WU), a military alliance between France, Belgium, the Netherlands, Luxembourg and the United Kingdom, promoting also economic, cultural and social collaboration, which emerged as a response to the threatening and expansionist policy shown by the Soviet Union already in the first years of the post-war period. This organisation would become the embryo of which, just 1 year later, and with the signing of the Washington Treaty on April 4, 1949 by the members of the aforementioned organisation, and in addition the United States of America, Canada, Denmark, Iceland, Italy, Norway and Portugal, would become the North Atlantic Treaty Organization, then made up of 12 states and which, based on Article 51 of the Charter of Nations, had as its main objective to provide collective defence and mutual military aid to member countries. Today, 30 countries are members of the North Atlantic Alliance.

In parallel, and only 1 year later, on May 9, 1950, the French minister of foreign affairs, Robert Schuman, would mark what is now considered the founding milestone of the future EU, with the speech that we know today as the Schuman Declaration, speech that would also serve to begin to heal the deep wounds still fresh after the war, incorporating Germany into the new alliances of Western Europe (its incorporation into NATO would take place 5 years later, on May 6, 1955).

The Western Union was succeeded by the Western European Union (WEU) after the amendment of the Treaty of Brussels in the 1954 Paris Conference, with the incorporation of Germany and Italy. Later, Portugal and Spain in 1990 and Greece in 1995 would end up joining this organisation, made up only of EU countries. It was in the year 2000 that the WEU agreed to gradually transfer its competences to the EU's Common Security and Defence Policy (CSDP). It should be noted that the predominance of NATO was indirectly recognised in the WEU Treaty, which highlighted 'the undesirability of duplicating the military staffs of NATO' (Latici 2020).

Today, NATO and the EU are two organisations with different characteristics and objectives but deeply nested structures, coexisting in the same changing scenario and with a common horizon. Both defend the rule-based international order that some international actors have been widely contesting. In an increasingly strategically competitive world, both organisations are trying to adapt to a very complex international environment, with old and new challenges different from those that faced originally, such as climate change, and cyber and hybrid attacks. It is in this scenario where the EU has to find its place and decide its present and future roles as a relevant actor: 'Strategic competitors such as Russia, China and Turkey are also present in the EU's southern and eastern neighbourhoods, and they are looking to fill strategic vacuums along the Union's borders, even if the tactics they employ to do so vary. Russia and China are both pursuing geopolitical and economic interests in a growing number of states, and the risk of poorly concealed proxy wars is rising. This implies that the EU has to better integrate counter-hybrid threat strategies and capacities in its missions and operations. Many of these hybrid threats are transboundary and trans-sectoral in nature, and they serve as a major common denominator in the threat perceptions of EU Member States' (Fiott and Lindstrom 2021).

The Munich Conference that took place on February 19, 2021 in the special edition of this Security Conference 'Beyond Westlessness', highlighted President Biden's message to his partners: 'America is back. The transatlantic alliance is back. And we are not looking backwards; we are looking forward, together' (Bunde 2021). Special interest aroused the words of French President Macron who made in the following terms: 'I do believe in NATO. I believe NATO needs a new political momentum and clarification of its strategic concept (SC). And NATO needs a more political approach' (Rose 2021). Today, a new SC that guides the organisation internally and externally has been adopted in Madrid on June 30, 2022 by the XXX Summit of the Alliance. This document defines the challenges of the organisation for the next decade. Partner countries such as Jordan, Bosnia and Herzegovina, or Mauritania have been present. Let us remember that the last SC dates to 2010. These reflections are significant considering also that the EU is, in recent years, experiencing an evolution in the development of its Common Foreign and Security Policy (CFSP) and, especially, in the CSDP, in terms of policies, instruments and initiatives. The EU is obliged to reflect on the security and defence that it wants and that it can. Since the entry into force of the Treaty of Lisbon and, a few years later, from June 2016, with the presentation of the Global Strategy on the EU's Foreign and Security Policy by the High Representative Federica Mogherini to the European Council, a significant number of initiatives is underway. As Professor Aldecoa points out, 'European defence policy is being born hand in hand with the Global Strategy' (Aldecoa 2018). Since

June 2020, we have witnessed the launch, by EU leaders, of a process aimed at defining an 'EU strategic compass', a document that was approved on March 21, 2022 by the Council and that aims to provide and facilitate the emergence of a common European security and defence culture. Culture, which, at present, unfortunately, is non-existent. In any case, it aims to provide the EU 'with an ambitious action plan to strengthen the EU's security and defence policy by 2030' (Council of the European Union 2022).

Thus, NATO and the EU, where 21 of its member states are part of the military organisation – except Austria, Ireland, Malta and Cyprus (Sweden and Finland will joint shortly) –, are themselves under restructuring and need to clarify their ideas about the joint role that both organisations can play, in the broadest sense and, in particular, in the Mediterranean basin and in the so-called 'Great Maghreb', facing many common challenges and threats such as terrorism, radical Islamist ideology, cross-border control to prevent illicit trafficking in drugs, people and weapons, enormous instability, irregular migratory flows and their link with mafias and organised crime or hybrid threats, to name but a few. But this task is not easy because of the absence of a strategy for the Mediterranean. As Professor Marquina points out 'Projecting stability without a NATO strategy for the Med, shared with partners, weakens and limits the reach of the practical initiatives' (Marquina 2019). On the contrary, we must remember that both organisations have different natures and very different functions and characteristics. However, they cooperate in a logical manner respecting the autonomy and procedures inherent in the decision-making process, and without prejudice to the specific nature of the member states' own security and defence policies. Basically, the EU is 'a civilian organisation with a military arm for the external operations referred to in Article 43(1) Treaty on the European Union (TEU) (Petersberg missions) and NATO is a military alliance tasked with organising the collective territorial defence of its members' (European Parliament 2022), and both are evolving in the same changing geopolitical context.

In this context, the EU has been deploying in recent years an entire arsenal of policies, strategies and actions with a variety of instruments of a different nature: political, legal, diplomatic, financial and security. However, it is necessary to pose certain questions: Is the EU a global actor? Can the EU provide security to its citizens, states and institutions with the current development of the CFSP and the CSDP? Why are the EU and NATO needed? Where should their relation go and how should they materialise to be more effective? Where are their main differences, gaps and clashes? If the EU aspires to be a strong actor on the international scene, 'it should have the leverage that a military capacity would give it in front of other international actors. Firepower to deter, first, and use if and when necessary, and as a last resource for its defence. Other deficiencies must be corrected, such as the one related to a better European Intelligence service. In consequence, the potential of the European External Action Service is untapped' (Nieto 2022).

Europe needs to adapt to new events and take defence seriously as a European public policy. The decisive steps taken by Sweden and Finland to formally request their entry into NATO on May 18, 2022 and the subsequent signing in Brussels of the 30 NATO members of the accession protocols of both countries on May 5 July made us reflect on the diagnosis of the present situation. Then, more budget at national and European levels, more capacities, more coherence and more integration are essential. This path is intricate when we observe that if we disaggregate by country, there are great differences and very different levels of implication. This also applies to the EU's defence industry: an effort to build an integrated common defence industry able to support the needs of the EU is mandatory. The integration of the European defence industry is a necessity. In this sense, on July 19, 2021, Commissioner Bretons announced, 'Une nouvelle étape dans l'integration européenne en matière e défense', referring to the fact that the commission adopted a proposal for a regulation by the European Parliament (EP) and the council establishing the European Defence Industry Reinforcement through common Procurement Act (EDIRPA) for 2022–2024. The objective of the instrument is the joint acquisition of weapons (European Commission 2022b).

To address the threats and challenges presented along this introduction, the second section presents the theoretical framework, and the third section describes the main advances in defence in the EU. The fourth section is dedicated to NATO and its SCs, and the fifth section provides an assessment of EU/NATO relations and some final reflections and conclusions.

2. Theoretical Background

Taking account of the existing wide and varied set of paradigms and theoretical approaches to European integration, there are several approaches that we could consider more appropriate for our analysis, such as the paradigm of functionalism or neo-functionalism, intergovernmentalism or the theory of interdependence. All of them have revolved around the very concept of integration. 'Integration theorising reflects the successive predominance of paradigms, although given the theoretical heterogeneity and even interdisciplinarity it is difficult to speak of «normal science» when considering the EU from the perspective of integration' (Closa 1994). Thus, Mitrany, a paradigm of functionalism, defines integration as the development of an international community through functional cooperation that makes war less likely. However, as Closa indicates, 'his model is developed from criticism of

the concept of union based on a federal constitution'. This functionalist theory was based on a list of causes that 'made integration unlikely, particularly the need to transfer individual loyalties from governments to the functional centre'. Neo-functionalism attempted to mitigate the insufficiencies of functionalism and is contrary to functionalism's postulated division into areas of 'high and low politics', from which only the latter could be transferred. Considering Haas and other neo-functionalists, the European Community (EC) was considered supranational. Haas defined the concept of supranationality as the existence of government authorities closer to the archetype of the federation than any previous international organisation, but without being identical to it (Haas 1968).

These authors operated with an explicit dependent variable, political integration or the politicisation process stimulated by the logic of 'spill-over', understanding this term as the expansive logic of the integration of sectors and referred mainly to economic (or welfare) areas. As Closa indicates in his analysis that we use as a reference, spill-over could be defined as the need for the satisfactory execution of policies in an integrated sector of activity to require the integration of other sectors not initially foreseen. Intergovernmentalism and independence theories have also played a great role in the study of the integration of the European project. Regarding the first and pointing to Puchala, starting from a realistic vision, the policy-making processes in the EC should be portrayed as an instrument that governments appropriate and use intermittently to pursue and obtain national objectives (Puchala 1983). However, and for our analysis, considering that the EU is a *sui generis* entity, where sovereignty is shared, although the integration process can be explained according to different paradigms in certain areas, it does not respond to just one of them. As Closa indicates, 'The instrumentalist consideration of the community, characteristic of intergovernmentalism, was softened by the analytical concepts of the perspective of interdependence'. These last two analyses, intergovernmental and interdependence, emphasise the role of national actors, as opposed to supranational actors. Consequently, and making Closa's words our own, we consider theoretical eclecticism the most appropriate to talk about European integration and, in particular, to apply it in the progress towards a common defence of the EU, or, in other words, towards a future unified European defence.

3. The EU's Main Advances in Defence

The CSDP is part of the CFSP. A whole series of political and military structures have been developed, offering a framework for EU action in the field of defence and crisis management, of ever-increasing collaboration and cooperation between member states in the field of defence. Regarding the main developments on the road to a Europe of defence, the implementation of an arsenal of far-reaching measures, instruments and initiatives stands out. Noteworthy are those aimed at developing civil and military capabilities and instruments.

3.1. Capability Development Plan (CDP)

Created in 2008, the CDP helps identify the EU capability development priorities agreed by member states and seeks coherence in defence planning between member states and at the European level. 'Main sources were the EU Collaborative Database (CODABA, hosted and managed by European Defence Agency [EDA]) and national plans and programmes' (European Defence Agency 2018). It was based on the identification of the CSDP deficits and the associated operational risks, considering the lessons learned in the missions and operations deployed abroad.

3.2. Military Planning and Execution Capacity (MPCC)

The MPCC, a military command and control structure that is created by the EU Council Decision within the EU Military General Staff (EUMS) in Brussels, 'will be responsible at the strategic level for the operational planning and conduct of non-executive military missions, working under the political control and strategic direction of the Political and Security Committee (PSC)' (Council of the European Union 2017). The director general of the MPCC, who is also the director of the EUMS, assumes the functions of mission commander in non-executive military missions and will report to the PSC and to the EU Military Committee. The MPCC will do its job in parallel and in a coordinated way with the Civilian Planning and Conduct Capability, notably through a Joint Support Coordination Cell. This new structure could be the embryo for the start-up of a European headquarters, designed to be more effective and more easily deployable and capable of directing EU missions and operations.

3.3. Permanent Structured Cooperation (PESCO)

Initiative formally launched in December 2017 (Council of the European Union 2017a) with the participation of all EU member states, except Denmark[1] and Malta, PESCO is expressly included in the Lisbon Treaty, art. 42.6, and is also

1 After the latest war events, Denmark, which had remained on the side lines of the European defence policy and its participation in military programs since 1993, recently held a referendum on June 1, 2022, under the leadership of its Prime Minister Mette Frederiksen to eliminate the so-called 'opt-out' clause (or non-participation clause) in defence matters in the EU. The Danish population was overwhelming and 'yes' won with almost 67% of the votes. It was a historic decision that demonstrates the turn of the Danes in terms of EU defence policy.

based on Protocol 10 of the TEU. The treaty provides that 'those member states whose military capabilities fulfil higher criteria, and which have made more binding commitments to one another in this area with a view to the most demanding missions shall establish PESCO within the Union framework'. Member states subscribe, among others, the commitments of regularly increasing defence budgets in real terms, in order to reach agreed objectives, and successive medium-term increase in defence investment expenditure to 20% of total defence spending (collective benchmark) in order to fill strategic capability gaps. In addition, the aim is to establish harmonised requirements for all capacity development projects agreed by the participating member states and to make a greater effort in cooperation in cyber defence such as the exchange of information, training and operational support; develop the interoperability of the forces; and guarantee their interoperability with NATO, 'agreeing on common technical and operational standards for the forces'.

Until now and under the umbrella of PESCO, >60 projects have been approved in four rounds or periods. The following areas of cooperation are covered: training facilities, land formation systems, maritime, air systems, cyber, enabling joint multiple services and space (European External Action Service 2021). In May 2021, the council itself authorised the participation of third-party states, specifically Canada, the United States and Norway, in projects on Military Mobility with great relevance to military missions and operations. Logically, they will have to comply with the established general conditions. In addition, 'for capability-orientated projects, its participation must also contribute to fulfilling priorities derived from the CDP and the Coordinated Annual Review on Defence (CARD), have a positive impact on the European Defence Technological Industrial Base (EDTIB) and make the European defence industry more competitive. In particular, the participation by a third state in a project must contribute mainly to the availability, deployability and interoperability of forces' (Council of the European Union 2020b). This third state must submit a request for participation, and the members of the project must unanimously agree to said participation. At the same time, this third participating state must share the values that underlie the EU, provide added value to the project and the objectives and contribute to reinforcing the CSDP.

The EU member states need to maintain their competitiveness in a challenging environment with emerging and disruptive military technologies – robotics, autonomous systems, miniaturisation, artificial intelligence and big data (Adán 2021) – that require huge long-term investments that have to be operational and sustainable in fast-paced technological and military environments. PESCO is a very young initiative, and it is difficult to assess the results obtained to date, although the first phase, which runs from 2018 to 2020, has already concluded with a strategic review process by the EU Council on PESCO (Council of the European Union 2020a). A second phase will cover the period 2021-2025.

3.4. European Defence Fund

Proposed by the European Commission in its communication of November 30, 2016 entitled 'European Defence Action Plan', where in order to face security challenges, it supported 'the creation of a more integrated defence market in the Union and fostering the uptake of European defence products and technologies in the internal market, thus increasing the non-dependency on non-Union sources. The commission proposed in particular to launch a European Defence Fund to support investments in joint research and the joint development of defence products and technologies, thereby fostering synergies and cost-effectiveness, and to promote the member states' joint purchase and maintenance of defence equipment'.

The European Defence Fund, which for the period 2021-2027 counts on a budget of EUR 8 billion, should complement national funding already used for that purpose, act as an incentive for member states to cooperate and invest more in defence and support cooperation during the whole life cycle of defence products and technologies (European Parliament and Council of the European Union 2021).

3.5. Directorate-General for Defence Industry and Space (DEFIS)

It was launched under the leadership of Commissioner Thierry Breton with the mission of leading the competitiveness and innovation of the European defence industry by ensuring the evolution of a technological base and strong industry. One of its major goals is 'to ensure that companies in the defence sector of the member states can access the defence markets of other member states' (European Parliament 2021).

3.6. European Peace Facility

An extra budgetary fund will have EUR 5 billion for the period 2021-2027 and will cover all external actions having military or defence implications and limited to the CFSP (Council of the European Union 2021). This fund has financed the supply of defence equipment to Ukraine so far with 2 billion euros as of July 21, 2022.

3.7. Neighbourhood, Development, and International Co-operation Instrument (NDICI)

This tool aims to increase the visibility of the EU's external policies, to improve the coordination with internal policies and to provide a faster Union response in crisis situations.

3.8. Coordinated Annual Review on Defence CARD

The CARD aims to offer a clearer overview of national defence spending plans, aligning national processes and

coordinating them with NATO processes, thus avoiding duplication (Ministerio de Asuntos Exteriores, Unión Europea y Cooperación 2022). This instrument is under the leadership of the EDA, which is based in Brussels and is under the direction of the High Representative of the Union for Foreign Affairs and Security Policies. The agency's mission is 'to support the council and the member states in their effort to improve the Union's defence capabilities in the field of crisis management and to sustain the CSDP as it currently stands and as it develops in the future'. Likewise, it will be able to implement measures 'to strengthen the industrial and technological base of the defence sector, participate in defining a European capabilities and armaments policy, and assist the council in evaluating the improvement of military capabilities' (Council of the European Union 2015).

3.9. European Defence Industrial Development Programme (EDIDP)

This program has as one of its main objectives to foster the competitiveness, efficiency and innovation capacity of the defence industry throughout the Union, which contributes to the Union's strategic autonomy.

3.10. Strategic Compass for Security and Defence

The most recent tool formally approved by the council on May 21, 2021, 'A Strategic Compass for Security and Defence for the EU that protects its citizens, values and interests and contributes to international peace and security' (Council of the European Union 2015), consists in an ambitious plan of measures, goals and clear milestones, resources and procedures to strengthen the security and defence policy from now until 2030. The Strategic Compass marks the EU's level of ambition in this matter. What is of greater depth, it provides 'a shared assessment of our strategic environment, the threats and challenges we face and their implications for the EU'. The EU decides to take more responsibility for its security, while deciding to strengthen the strategic partnership with NATO and the UN and other International Organisations to achieve common goals. The EU decides to strengthen its capabilities in all domains: land, maritime, air, space and cyber domains. Two of the proposals that have attracted the most attention are the strengthening of civilian missions, with the creation of an expert mission of 200 troops in <30 days even in situations of risk, and the creation of an EU Rapid Deployment Capacity planned for 2024 and put into operation in 2025. Another of the most striking actions born under the scope of the Strategic Compass is to create a Defence Innovation Hub within the EDA, working in partnership with the commission, to increase and coordinate cooperation on defence innovation among member states'. Undoubtedly, these proposals are necessary, but clearly insufficient.

In addition to the instruments described earlier, it is relevant to point out the work carried out by the European Commission and its contribution to the European defence through a communication presented on February 15, 2022. It is noted that 'a quantum leap in European defence is an integral and indispensable part of securing the Union and its citizens', that one of the lessons learned at the end of the mission in August 2021 in Afghanistan is that the Union must be better prepared for sudden emergencies, reducing its high dependency on external forces, that 'the industrial ecosystem that defence forms together with the aerospace and the security sector constitutes a high-tech industrial ecosystem that is not only an essential driver for Europe's open strategic autonomy and technological sovereignty but also a major contributor to growth and innovation', and that in order to achieve a more competitive and harmonised European defence market, some requirements are necessary, which were listed as follows:

1. Increase investment in research and capabilities (taking advantage of the possibilities offered by Directive 2009/43/CE);
2. Reduce strategic dependencies (raising awareness of the critical nature of certain technologies such as semiconductors for the security and defence sectors and taking account of the conclusions of the so-called Observatory of Critical Technologies);
3. Encourage the joint acquisition of European defence capabilities[2];
4. Advance in rationalised and more convergent export control practices;
5. Consolidate the security and defence dimension of space at the EU level;
6. Strengthen European resilience, especially in the field of cybersecurity, improve military mobility and address the challenges of climate change for defence (European Commission 2022a).

2 A very relevant fact is that 'Member States have yet to meet the long-standing European collaborative equipment procurement collective benchmark – 35% of defence equipment spending, which they have confirmed within the PESCO framework –. According to the EDA, in 2020 Member States have spent around EUR 37 billion in defence equipment procurement expenditure (i.e. procurement of new defence equipment). Of this amount about only 11% (around EUR 4.1 billion), was spent on European Collaborative Defence Equipment Procurement Expenditure (i.e. procurement of new defence equipment in collaboration with other Member States). This means that the bulk of Member States' defence equipment procurement expenditure (around 89%) was made on a national basis and/or in cooperation with third countries.' In the same way, early 2023, the Commission will make a proposal that would enable a VAT waiver 'to support the joint procurement and ownership of defence capabilities developed in a collaborative way within the EU'.

4. NATO and the SC

According to Article 2 of the Washington Treaty, 'The Parties will contribute towards the further development of peaceful and friendly international relations by strengthening their free institutions, by bringing about a better understanding of the principles upon which these institutions are founded and by promoting conditions of stability and well-being'. NATO serves the interests and values of both sides of the Atlantic and is regional in scope. Its membership is open 'to any other European state willing to support the principles of this treaty and to contribute to the security of the North Atlantic area'. It is a regional organisation with global concerns. Its strategic direction is set by the heads of state and government of the member states and is defined by the so-called SC. This document sets out the alliance's core tasks and fundamental principles, its values, the evolving security environment and the alliance's strategic objectives for a period of approximately a decade: Seven SCs have been adopted to date, the first three – 1949, 1957 and 1967 – in the context of the Cold War, and this was a period when international geopolitics was characterised by a bipolar confrontation between East and West; three SCs in the post-Cold War period –1991, 1999 and 2010 –; and the last one in the year 2022: Back to a new Cold War?

Bird's-eye view (NATO 2022b), the 1949 SC was aimed at deterring aggression from the former USSR (the Warsaw Pact did not yet exist). NATO forces would only become involved if an attack was launched. The 1957 SC was presented with a new approach to nuclear weapons. This approach endorsed 'massive retaliation' as a key element. The SC 162/2 pointed out the importance of nuclear weapons to the defence of Europe: 'The major deterrent to aggression against Western Europe is the manifest determination of the United States to use its atomic capability and massive retaliatory power if the area is attacked' (Pedlow 1997). The 1967 SC sought a relaxation of tensions between east and west. The Harmel Report was produced providing a dual track for security: political and military. The notion of deterrence and détente was introduced. 'The same means would be used as the adversary, and at the same time, crisis management, disarmament and détente were promoted'. The 1991 SC ushered in a new era with the dissolution of the USSR and thus of the Soviet hegemonic threat. Priority was given to political dialogue, and the so-called 'Partner for Peace' was encouraged. In 1999, the SC appeared in the context of the wars in the former Yugoslavia and presented a broader perspective on the concept of security. It recognised the importance of political, economic, environmental and social factors in addition to the defence dimension. The core tasks of the Alliance were security and defence, and the importance of crisis management and partnerships was emphasised. It also agreed to maintain a combination of conventional and nuclear forces. The so-called 'cooperative defence' was timidly initiated. The 2010 SC was based on three pillars: collective defence, crisis management and cooperative security. Crisis management operations around the world are of great importance. And finally, the 2022 SC, a document associated with a new context of increased geostrategic competition between the powers, Russian aggression, and the rise of China. Once again, the defence of Alliance territory is at the forefront of concern.

NATO – whose allied countries share values, interests, the rule of law and the defence of freedoms – unveiled its last SC, adopted at the Madrid summit on June 30, 2022. In this document, its members set their strategy for the new decade and share risks and threats that come not only from the eastern flank but also from NATO's southern neighbourhood, in particular the Middle East, North Africa and Sahel regions that are facing 'interconnected security, demographic, economic and political' challenges (NATO 2022a). Present threats, such as terrorism, and future threats not only to our territories — armed attack on the territory, article 5 of the NATO Treaty — but also those that are yet to come, and many others that affect our security, and that are coming authoritarian regimes, for example, when they instrumentalize migration, promote disinformation campaigns, manipulate energy supply chains or use economic coercion. Today, Russia is the most significant and direct threat to the allies and stability in the Euro-Atlantic area, and China is the great challenge. The SC once again includes the three main tasks of the Alliance: deterrence and defence, crisis prevention and management and cooperative security. NATO states that 'no one should doubt our strength and resolve to defend every inch of Allied territory, preserve the strength and territorial integrity of all Allies and prevail against any aggressor'. Maintaining NATO's strategic advantage is a priority, and for this reason, on June 30, the NATO Secretary General and the leaders of 22 countries launched the Innovation Fund, which will invest 1 billion euros in start-ups and other venture capital fund in order to develop dual-use emerging technologies relevant to NATO.

The NATO Summit in Madrid, which counted on the presence of Charles Michel, president of the European Council, and Ursula von der Leyen, president of the European Commission, could be described as historic. The most far-reaching decisions have been pointed out by the NATO Secretary General in his recent appearance in front of the EP on July 13, 2022: 1. NATO allies will increase their economic and military aid to Ukraine to support its right to self-defence. The best methods to maintain a long-term support, not only in material and budgetary terms but also to support the build and strengthen robust defence institutions in Ukraine, will be investigated and deployed. 2. NATO is not a contender, and it will not be directly involved in the fight on the ground.

3. The need of the biggest change in terms of defence since the Cold War has been agreed in all domains: land, sea, air, space cyberspace. A more advanced deployment of the troops on the eastern flank of the Alliance has been decided. The number of battlegroups, established in Poland, Romania, Slovakia, Hungary and Bulgaria, will be doubled, increasing from 4 to 8, and its number of troops will increase up to size of brigades. Today, there are 42,000 troops under NATO command, and the plan is to have >300,000 troops with rapid deployment capability, conveniently deployed in well-pre-positioned scenarios and well trained by means of adequate exercises and manoeuvres. 4. Sweden and Finland will promptly join NATO following their formal requests. The accession protocols have been signed, and the last step to materialise this relevant milestone is the ratification by the parliaments of the 30 member countries. NATO's door is open to other new members. 5. The document also warns about the increasingly close collaboration between China and Russia. Topics such as technology, cybernetics and climate change have been in the background of any ongoing discussion at the summit (European Parliament 2022).

5. EU/NATO Relations

The relations between EU and NATO date back to the 1990s and became institutionalised in the early 2000s.[3] The 2002 Declaration between NATO and the EU on a European Security and Defence Policy (ESDP) was a key milestone that reinforced the EU's assured access to NATO's planning capabilities for the EU's own military operations. But the legal framework of the relations between the two organisations is based on the 2003 Framework Agreement, which is limited to 'the shared use with the Union of NATO planning structures, assets and collective capabilities in connection with the planning and conduct of the Union's CSDP military operations in accordance with the "Berlin Plus" arrangements' (Summaries of EU Legislation 2007). These arrangements thus facilitate NATO support to EU crisis management operations. The 'Berlin Plus' agreements also enabled the sharing of classified information essential for operational cooperation in crisis management. In short, they effectively allowed NATO to support EU operations without NATO being directly involved. Subsequently, at the 2010 Lisbon Summit, the allies underlined their determination to enhance the EU–NATO strategic partnership. At that time, Russia was a strategic partner for the allies. Much has happened since then.

Undoubtedly, the EU and NATO are organisations of a different nature, with different competencies, which have decided to strengthen their ties in the quest to design a strategic alliance for the present and the future. NATO, made up of 30 countries, takes decisions by consensus (all agree not to disagree or dissent) and not by unanimity as is sometimes claimed. By contrast, the EU is a 'sui generis' organisation made up of 27 member states, where sovereignty is shared and where the decision-making process is somewhat complicated given the different European public policies. In the case at hand, decision-making in the field of security and defence, and it would be very convenient to go beyond unanimity required by the EU Council (with few exceptions). Let us recall that the CFSP is defined and implemented by the European Council and by the Council of the Union, with a not inconsiderable role of representation also played by both the President of the European Council and the High Representative of the Union for Foreign Affairs and Security Policy, where the European Commission and the EP have limited functions, and with a de facto secondary role of the EP in foreign policy affairs (Nieto 2021).

Regarding the legal basis, the most important clauses that guarantee collective defence and solidarity with its members are articles 42.7 of the TEU, article 222 of the Treaty on the Functioning of the European Union (TFEU)[4] and article 5 of the Washington Treaty.[5] The EU recognises the role of NATO towards its members in article 42.7 of the TEU. It indicates 'If a member state is the object of armed aggression on its territory, the other member states must help and assist it with all the means at its disposal, in accordance with Article 51 of the Charter of the United Nations'. It is understood that this will not prejudice to the specific nature of the security and defence policy of certain member states. However, there is debate in the context of transatlantic relations about how to define more clearly the parameters of these three clauses mentioned.

On a practical level, once known, the two most important strategies released this year 2022, the NATO SC and the EU Strategic Compass, it is worth noting that the response to the Russian aggression – with huge implications for the EU, international security and other derivatives[6] – has rested more

3 For a more detailed analysis of these relationships it is interesting to read the Briefing of the European Parliament entitled: Understanding EU-NATO cooperation. Theory and practice (Latici 2020).

4 The Article 222: 1 of the TFEU provides that 'The Union and its Member States shall act jointly in a spirit of solidarity if a Member State is the object of a terrorist attack or the victim of a natural or man-made disaster'.

5 The clarification of the NATO Summit Communiqué of June 14, 2021, which indicates that the North Atlantic Council can decide to invoke article 5 in the case of hybrid warfare, as well as in the case of armed attack, as well, is very significant.

6 We cannot fail to point out the enormous implications for the EU, starting with the packages of sanctions against Russia (the seventh of which is being processed at the time of this writing), the substantial economic, financial and humanitarian aid, and the military support that, for the first time, has activated the instrument called European

heavily on the NATO shoulders and has driven to a closer collaboration between both organisations, bringing their already close strategic orientations even closer together. Both organisations share many challenges, same neighbourhood – with a southern flank characterised by increasing instability on the rise – and have increased their common action, especially after the illegal annexation of Crimea in 2014. Both strategies have a high political content, and it will be necessary to be attentive to the effects, in praxis, on the EU CSDP. In this regard, we bring up the eternal debate between more EU autonomy or more complementarity with NATO, a debate beyond the scope of our work.

Likewise, to strengthen greater cohesion between the two organisations, following the Madrid Summit, the European Commission, the NATO Secretary General and the European Council are already working on what would be the Third Declaration on EU/NATO cooperation. As the NATO Secretary General pointed out in his appearance in the Committee of Foreign Affairs at the EP, on July 13, 2022, it is useful to have this Third Declaration to highlight the main priorities and to ensure that the projects being developed in the framework of PESCO are being implemented and that there is a follow-up.

The first EU–NATO Joint Declaration, signed in Warsaw on July 8, 2016, states that the two organisations are 'essential partners' in the provision of Euro-Atlantic security (Tusk, Juncker, and Stoltemberg 2016). Seven specific areas were identified to strengthen cooperation: 1. countering hybrid threats, 2. operational cooperation including at sea and on migration, 3. cyber security and defence, 4. defence capabilities, 5. defence industry and research, 6. exercises, and 7. supporting eastern and southern partner's capacity – building efforts, all of them split in 42 specific proposals. In December 2017, that list was expanded with 32 new proposals, including military mobility, peace, security, counterterrorism and women.

The second EU–NATO Joint Declaration took place in Brussels on July 10, 2018 (Tusk, Juncker, and Stoltemberg 2018). In this occasion, both organisations paid attention especially on the areas of military mobility (joint exercises and training have been identified as important ways of developing common working methods. Key EU–NATO exercises have taken place in the hybrid and cyber domains), counterterrorism and strengthening resilience to chemical, biological, radiological and nuclear-related risks as well as promoting the women, peace and security agenda. This joint declaration where the EU's efforts to strengthen European security and defence are recognised, especially with PESCO and the European Defence Fund, whose regulation will be repealed as of January 1, 2021 (European Parliament and the Council of the European Union 2021). There has been an increase in operational cooperation in missions, and there have been permanent military liaisons to facilitate future cooperation. 'As a result of the increase in operational cooperation, permanent military liaisons have been established to facilitate future cooperation. As such, NATO has had a team operating at the EU Military Staff headquarters since 2005 while the EU has had a team at SHAPE since March 2006' (Latici 2020). This cooperation has been guided by some key principles: openness, transparency, inclusiveness and reciprocity, in full respect of the decision-making autonomy and procedures of both organisations without prejudice to the specific character of the security and defence policy of any member state (European Union External Action 2020). One of the key bases in this cooperation is the so-called 'single set of forces' principle. This principle means that the common members do not have one armed force for NATO and one for the EU.

Regarding the most recent new dynamics of cooperation, we can state that in the last 5 years, there has been a continuous approaching exercise at political and institutional levels between the EU and NATO, and, in fact formal and informal consultations and coordination contacts have intensified. Some of the most relevant events have been the first debate between a NATO Secretary General and the College of Commissioners of the Union in December 2020, the participation of the NATO Secretary General at the European Council in February 2021 (NATO 2021) and the informal working lunch between the ministers with the NATO Secretary General Jens Stoltenberg on new areas for EU–NATO cooperation, such as climate and defence, resilience and emerging and disruptive technologies, on November 16, 2021. Another event with a strong political and media message was the joint trip of Jens Stoltenberg and Ursula von der Leyen to Lithuania and Latvia, in response to Belarusian migratory pressure on the border with the EU, in November 2021.

Similarly, the meeting between Jens Stoltenberg, Charles Michel and Ursula von der Leyen on 24 February 2022 to talk on several aspects of the crisis in Ukraine stands out.

In this endeavour to strengthen collaboration between the two organisations, it is important to note the participation of NATO Deputy Secretary General Mircea Geoană in the meeting of the EU Foreign Affairs Council in its defence configuration on May 17, 2022, where he assessed the military support to Ukraine. That meeting was attended by the Minister of defence of Ukraine Oleksiy Reznikov via videoconference. The very complex situation in the Sahel was also a point in the discussion, and there was a decision to take measures with regard to Mali in the sense of suspending the operational training of the units of the Malian armed forces and national

Peace Facility,- which has resulted in support of EUR 2.5 billion euros for the Ukrainian armed forces, the enormous energy crisis that it has caused in the EU, the food crisis that is already affecting the African continent, the derivatives related to war crimes committed by Russia that are being investigated.

guard, task entrusted to an EU training mission, due to the lack of guarantees from the transition authorities on non-interference by Russian mercenaries. It was also decided to launch the EU Advisory Mission to Ukraine (EUAM Ukraine) to assist in border management and war crime investigation. Ministers discussed the following options: enhancing the robustness, efficiency and flexibility of the mandates for CSDP missions and operations; designing a more preventive CSDP posture through the expansion of military cooperation and advice; accompanying the implementation of the European Peace Facility with military expertise; and introducing a more agile model of EU military action through small teams of advisers and increasing the use of military advisers in EU delegations (Council of the European Union 2022b).

Finally, it is also revealing that the EDA steering board met before the council meeting and discussed the 'scoping EU defence investment gaps' analysis that the agency produced as requested by the heads of state or government at their informal meeting in Versailles on March 10–11, 2022.[7] The steering board approved the establishment of a Hub for EU Defence Innovation (HEDI) within the EDA. The HEDI will be a platform to support the cooperation on defence innovation among member states of the EU and will ensure synergies with the European Commission and coherence of output with NATO innovation initiatives (European Defence Agency 2022).

6. Conclusion

EU–NATO cooperation, which goes back more than seven decades, has increased in recent years following the annexation of Crimea and the recent Russian imperialist act against Ukraine in February 2022. The latter – which has brought war back to Europe and threatens the world with conflict on a global scale – has triggered greater cohesion and unity both internally within and between the EU and NATO. Both organisations stand for the security of their members and for the defence of democratic principles and a rule-based international order, which is being strongly contested by revisionist powers.

The EU and NATO share the same neighbourhood, both on the eastern and southern flanks, the same risks, threats, and challenges, and need to provide an indivisible security response.

The direct menace from Russia and the advancing Chinese challenge, as reflected in the two main strategic documents guiding the EU's and NATO's steps for the next decade – the Strategic Compass and the SC – lead us to assert that ties have been strengthened and revitalised in both the political and military dimensions of the two organisations.

The trend in the current hostile geopolitical environment should lead the EU and NATO to consolidate a strategic alliance and smooth out the ups and downs in relations, particularly in the transatlantic area. The military dimension of security is once again taking precedence over the political dimension, as it did during the Cold War and in 1949 with the establishment of the first SC.

It is a fact that Russia has wanted to return to the so-called 'spheres of influence'. NATO and the EU must turn this threat into an opportunity to make international peace and security and the rule of law prevail against illiberal and totalitarian winds.

7 The European Council adopted the Versailles Declaration and addressed Russia's aggression against Ukraine, as well as three key dimensions: strengthening defence capabilities, reducing energy dependence and developing a stronger economic base. Informal meeting of the Heads of State or Government Versailles Declaration 10 and 11 March 2022 (European Council 2022).

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