

**The European Union's Strategic compass – a new strategic approach
for CSDP or just a reaction based on a war in the neighbourhood?**

Essay

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Abstract and Keywords

Currently, the European Union faces several challenges that affect its security and defence. External borders have never been so unstable, and Member States cannot respond alone to all contemporary threats. Therefore, it appears necessary for the European Union to strengthen the Common Security and Defence Policy.

This essay was carried out within the scope of the 7th Common Security and Defence Policy Olympiad, and its central question is: “Is the European Union’s Strategic Compass a new strategic approach to the Common Security and Defence Policy or just a reaction based on a war in the neighbourhood?”. To conduct the investigation, the difficulties of implementing the Compass were researched, its strengths and weaknesses, and its relationship with the North Atlantic Treaty Organization.

A systematic review of the literature was carried out to perform the research. The research took place on the EBSCOhost search engine considering the period between 2013 and 2023. All existing articles were included, totalling 153 articles. After applying inclusion and exclusion criteria, 17 articles were selected for analysis.

It is concluded that the Strategic Compass was a plan conceived before Russia invaded Ukraine, so it isn’t a reaction; however, as this event of global plenitude had such a profound impact that it affected all parts of the world, this war also affected the Strategic Compass.

Keywords: Strategic Compass; European Union, Common Security and Defence Policy; Ukraine; Conflict.

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2. Preface

I am a 2nd Lieutenant at the Military Academy attending the Training for Officers of the National Republican Guard. During my training, I had the opportunity to deepen my knowledge about security and defence. I completed the Common Security and Defence Policy module in the Portuguese Military Academy International Spring Semester and the Cyprus Cadet Leadership Development Training module. I acknowledge the honour of participating in the European Initiative for the Exchange of Young Officers, inspired by Erasmus, at the 7th Common Security and Defence Policy Olympiad – organized by the National University of Public Service.

As a military, I emphasize the relevance of improving my knowledge about collective security and standard defence capacity, as we live in a world where threats don't know borders and States, considered by themselves, cannot respond fully to contemporary challenges.

Therefore, I decided to deepen the research on the Strategic Compass of the European Union, being this research not just academic but a personal journey that will shape my career and future responsibilities with security and defence, namely, as an Officer of a Security Force of a nature military, the National Republican Guard.

3. Introduction

We live in a world characterized by uncertainty and complexity.¹ The idea of the Strategic Compass arose when the European Union (EU) lacked a common European security and defence culture, and it began to be thought of in 2020 to guarantee the EU's ability to act autonomously.² This need was accentuated by the withdrawal of the United Kingdom (UK) from the EU (the Brexit) and the coronavirus pandemic, which exposed vulnerabilities and highlighted the need to act together.³

The focus on security and defence derives from the instability experienced around Europe's borders.⁴ The EU's concern with security and defence began to increase in December 2013, when it began improving security and defence capabilities.⁵ In this sense, Sweeney and Winn (2022) reinforce that *“the lines between peace and war and external and internal security are increasingly blurred.”*⁶

It is noticeable that political power is aware of security and defence issues. However, the opinion of the European population is also relevant to understanding the perception regarding these matters. According to Eurobarometer data: i. 76% of respondents consider that the conflict showed the need to increase military cooperation between the MS; ii. 85% consider that the conflict highlighted the need for the EU to guarantee its energy and economic security; iii. 77% support the Common Security and Defence Policy (CSDP); iv. 80% agree that cooperation on defence issues should be increased; v. 77% understand that the acquisition of military material by the Member States (MS) must be better

¹ General Secretariat of the Council. (2022). A Strategic Compass for Security and Defence – For a European Union that protects its citizens, values and interests and contributes to international peace and security. Council of the European Union.

² Mangin, F. (2022). A «Bússola Estratégica» Um passo histórico para a Europa da Defesa. *Relações Internacionais*. Volume 73.

³ Koenig, N. (2020). The EU's strategic compass for security and defence: Just another paper? Hertie School: Jacques Delors Centre.

⁴ Calderón, J. (2021). The European Union Strategic Compass. Analysis Paper. Instituto Español de Estudios Estratégicos. Volume 45. No. 1/2021.

⁵ Sus, M. (2021). Defense: The EU Strategic Compass' three principles: Inclusivity, integration, and implementation. *International Affairs*. The Hague Centre for Strategic Studies. Volume 97. No. 3/2021.

⁶ Sweeney, S. & Winn, N. (2022). Understanding the ambition in the EU's Strategic Compass: a case for optimism at last?. *Defence Studies*. Routledge: Taylor & Francis Group. Volume 22. No. 2/2022. P. 200.

coordinated; vi. 69% believe the EU needs to strengthen its military material production capacity; and vii. 66% believe that there should be more investment in EU security.^{7 8}

Before Russia invaded Ukraine, several circumstances indicated uncertainty in the world situation: i. the withdrawal from Afghanistan; ii. the case of the alliance between Australia, the UK, and the United States of America (USA) (AUKUS); iii. the resurgence of hybrid threats in Eastern Europe; and iv. political uncertainty in the USA makes it necessary to clarify the EU's security and defence policy.⁹

Despite the scepticism of many MS, constructing the compass begins with analysing threats in the second half of 2020. It continues developing based on this same analysis between 2021 and 2022, as shown in Figure 1.¹⁰

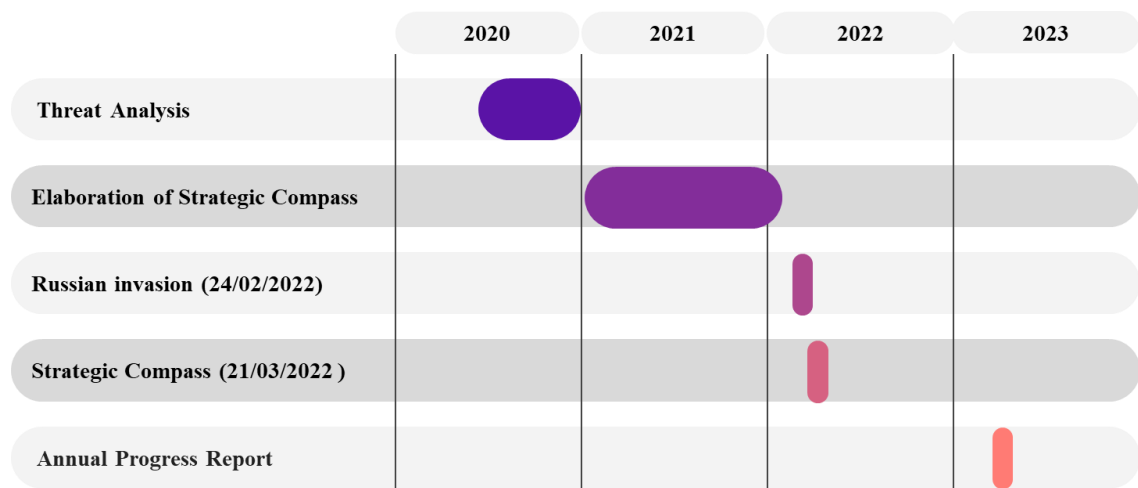


Figure 1: Timeline of events¹¹

It is noticeable that is imperative to unlock European defence through the Strategic Compass: i. develop a shared vision; ii. develop a common strategic culture; iii. uncover strategic autonomy; iv. close a new transatlantic agreement; v. deepen cooperation; vi. become a more active security provider and improve resilience and protection. The only

⁷ Eurobarometer: EU challenges and priorities in 2023. Page European Union. <https://europa.eu/eurobarometer/surveys/detail/3092>. [03-10-23].

⁸ European Commission. (2023). Standard Eurobarometer 99 Spring 2023: European citizenship. European Union.

⁹ Koenig, N. (2021). From Strategic Compass to Common Course: Key deliverables and implementation paths. Hertie School: Jacques Delors Centre.

¹⁰ Molenaar, A. (2021). Unlocking European Defence. In Search of the Long Overdue Paradigm Shift. Istituto Affari Internazionali. Volume 21. No. 1/2021.

¹¹ Figure created by the author.

way to guarantee the survival of the EU in a time of complexity is to transform the EU into a global strategic actor, fully asserting its strategic autonomy.¹² Although the concept of strategic autonomy is on the agenda, this concept dates back to December 4, 1998, with the Declaration of St. Malo, where it was defined that *“to play its full role on the international stage (...) the Union must have the capacity for autonomous action, backed up by credible military forces, the means to decide to use them, and a readiness to do so, in order to respond to international crises”*.¹³ Since 2013, the EU has been using this concept, having been clarified in November 2016 as the *“capacity to act autonomously when and where necessary and with partners wherever possible”*¹⁴, and being used consecutively.¹⁵ Therefore, strategic autonomy is more important than ever in the contemporary world.¹⁶ Despite the importance of strategic autonomy, the Strategic Compass appears only once in the final document.¹⁷

Regardless of the illusion that defence is not intrinsic or part of the EU's “Deoxyribonucleic Acid” (DNA), it can be refuted, as it is provided for in European Treaties and the competencies of EU institutions.¹⁸ In this sense, the EU must change that perspective.¹⁹ However, the High Representative of the European Union for Foreign Affairs and Security Policy/Vice-President of the European Commission (HR/VP), Josep Borrel, considers that EU's traditional alliances continue to be essential and insufficient for future approaches.²⁰ In this sense, he quotes the German Defence Minister, who warned that *“Only if we take our security seriously, will America do the same”*²¹, adding that in specific contexts, such as the Sahel, Libya, and the Eastern Mediterranean, they are an EU problem, and not an USA's. This strategic autonomy is an imperative as

¹² Cf.: Molenaar, A. (2021). Op. cit.

¹³ Mauro, F. (2021). Europe's Strategic Autonomy: That Obscure Object of Desire. L'Institut de relations internationales et stratégiques. P. 3.

¹⁴ General Secretariat of the Council. (2016). Council conclusions on implementing the EU Global Strategy in the area of Security and Defence. Council of the European Union. P. 2.

¹⁵ Borrel, J. (2020). Pourquoi l'Europe doit-elle être stratégiquement autonome?. Éditoriaux de l'Ifri.

¹⁶ Cf.: Ibid.

¹⁷ Freitag, V. (2022). Policy Brief: French presidency of the EU and Strategic Compass: More EU military missions to come?. Europeum. Institute for European Policy.

¹⁸ Coelmont, J. (2021). Seven steps to European Defence, Transatlantic Equilibrium, and Global Europe. Egmont Institute. No. 151/2021.

¹⁹ Cf.: Ibid.

²⁰ Cf.: Borrel, J. (2020). Op. cit.

²¹ Ibid. P. 4.

protection against the cascading effects of neighbourhood crises in case of the need for self-defence.²² In practice, autonomy depends on the ability to decide and act, so for the HR/VP, this is the core of the Strategic Compass.²³

On January 31, 2020, Brexit happened. This decision shook the EU, and more specifically, the CSDP, considering that, in 2019, the UK was the sixth country in the world that invested the most in defence and was the EU country that invested the most in this area. Additionally, after Brexit, investment from the UK remained high; in 2020, it became the fourth country in the world that invested the most. Subsequently, in 2021, reached third place. More recently, in 2022, the UK was the fourth country that invested the most.^{24 25 26 27} Therefore, Brexit has become an obstacle to the EU's strategic autonomy, an ambition since the 2016 European Union Global Strategy (EUGS) was approved. Thus, complementarity between the EU and NATO becomes even more critical with the withdrawal from the UK, even though a close partnership between the EU and the UK is in the common interest.²⁸ The European Intervention Initiative (EII) is an example of the importance of this partnership.²⁹

²² Ibid. P. 4.

²³ Cf.: Mauro, F. (2021). Op. cit.

²⁴ The International Institute for Strategic Studies. (2020). The Military Balance 2020. Routledge: Taylor & Francis Group.

²⁵ The International Institute for Strategic Studies. (2021). The Military Balance 2021. Routledge: Taylor & Francis Group.

²⁶ The International Institute for Strategic Studies. (2022). The Military Balance 2022. Routledge: Taylor & Francis Group.

²⁷ The International Institute for Strategic Studies. (2023). The Military Balance 2023. Routledge: Taylor & Francis Group.

²⁸ Cf.: Sweeney, S. & Winn, N. (2022). Op. cit.

²⁹ Mills, C. The European Intervention Initiative (EII/EI2). Page UK Parliament. <https://commonslibrary.parliament.uk/research-briefings/cbp-8432/>. [02-11-23].

4. Current State of Research

The Strategic Compass does not replace or revise the EUGS despite being partly related to the strategic aspect of the EU. It appears simultaneously as an action plan. In this sense, it emerges as the way to implement the EUGS.³⁰

The draft Strategic Compass, released in November 2021, presented severe deficits. Although some authors consider that the Strategic Compass was designed to improve the EUGS of 2016, some mistakes made previously must be remembered, such as issues related to Russia only being mentioned in just two paragraphs.³¹ The lack of political desire (emphasized by the lack of consensus among MS), unclear ambition, and indeterminate responsibility were identified as the primary deficiencies.³² At the same time, Tallis³³ considers the document too “dramatic,” stating that it presents a too-dark vision of the world, which he compares with the 2003 Strategy that sought “*a secure Europe in a better world and emphasized opportunities as well as threats.*”³⁴ Despite this, the EU's external commitments have been increasing since the entry into force of the Lisbon Treaty.³⁵

Months before the Ukraine war started, three dangers were identified in the Strategic Compass draft: i. the need for consensus can reduce the level of ambition; ii. controversial decisions may be postponed until the implementation phase; and iii. MS can refrain from using the instruments they create.³⁶ Two years before the outbreak of the conflict in Ukraine, the expected validity of the Compass (10 years) was seen as unrealistic, as it could already be out of date at the time of publication.³⁷ From this perspective, the

³⁰ Fiott, D. & Lindtrom, G. (2021). Strategic Compass: New bearings for EU security and defence?. Page EU Institute for Security Studies. https://www.iss.europa.eu/sites/default/files/EUISSFiles/CP_171_0.pdf. [02-10-23].

³¹ Nováky, N. (2021). The Strategic Compass: Charting a New Course for the EU's Security and Defence Policy. European View. Sage Journals. Volume 20. No. 1/2021.

³² Kaim, M. & Kempin, R. (2022). Compass or Wind Chime? An Analysis of the Draft “Strategic Compass” of the EU. German Institute for International and Security Affairs. Stiftung Wissenschaft und Politik. No. 3/2022.

³³ Tallis, B. (2022). Why Europe's Strategic Compass Points to Trouble. Internationale Politik Quarterly. No. 4/2023.

³⁴ Ibid. P. 3.

³⁵ Perissich, R. (2021). Europe's Strategic Compass: Merits and Shortcomings. Istituto Affari Internazionali. Volume 21. No. 5/2021.

³⁶ Cf.: Koenig, N. (2021). Op. cit.

³⁷ Cf.: Koenig, N. (2020). Op. cit.

measures implemented by the EU should be systematically reviewed to evaluate the results regularly. This mid-term review would not aim to replace or complement but to evaluate its implementation.³⁸ After the Covid-19 pandemic, which intensified rivalry between the great powers, Russia's invasion of Ukraine determined the need for the EU to react quickly and decisively. This event triggered several reactions; namely, i. increased investments in security and defence; ii. the reversal of the position regarding the CSDP by Denmark (Denmark started to participate fully in the EU's CSDP after 30-year-old opt-out clause³⁹); and iii. the candidacy of Sweden and Finland to NATO.⁴⁰ With Russia's invasion of Ukraine on February 24, 2022, questions were raised about a possible postponement of the launch of the Strategic Compass, but this possibility was rejected. Several arguments were presented against the postponement: i. action is needed now and not later; ii. asking for a postponement of Compass presupposes that the document cannot respond to current possible conflicts; iii. Russia's actions before its invasion had already been identified since the threat analysis in November 2021.⁴¹ The fact that the Compass was drawn up before Russia changed the global situation created a gap between the document and reality.⁴² The document was redrafted in the month before its release to include Russia's aggression against Ukraine. This focus on the conflict is immediately observable in the document, specifically in the frequency of use of words related to it: Russia (16); Russian (4); Russians (2); Russians (1); Ukraine (18); Ukrainians (1).

This may represent a lack of strategic vision, even though this invasion further emphasizes the need for a clear strategy and military capabilities to respond to the current

³⁸ Cf.: Ibid.

³⁹ EEAS Press Team. (2022). Denmark: Statement by the High Representative on the outcome of the referendum on the opt-out in defence matters. Page European Union External Action. https://www.eeas.europa.eu/eeas/denmark-statement-high-representative-outcome-referendum-opt-out-defence-matters_en. [01-11-23].

⁴⁰ Castro, R. & Lobo, R. (2022). A Compass and a Concept: a Guide to the EU and NATO Strategic Outlooks. *Transatlantic Policy Quarterly*. Volume 21. No. 2/2022.

⁴¹ Fiott, D. (2022). The Day After: the EU's Strategic Compass and the protection of Europe. *The Progressive Post*. Page Foundation for European Progressive Studies. <https://progressivepost.eu/the-day-after-the-eus-strategic-compass-and-the-protection-of-europe/>. [09-10-23].

⁴² Witney, N. (2022). The EU's Strategic Compass: Brand new, already obsolete. Page European Council on Foreign Relations. <https://ecfr.eu/article/the-eus-strategic-compass-brand-new-already-obsolete/>. [06-10-23].

global situation.⁴³ The HR/VP was faced with adding an updated preface and highlighting the urgent need for a radical change in EU security and defence.⁴⁴ Given this circumstance, the MS had to submit the document to an intense series of revisions quickly. Three changes stand out when comparing the initial draft with the final version: i. more focus (references to Russia became stronger); ii. more money (through more and better investments); and iii. more urgency (in implementing the document).⁴⁵

Regarding Russia before the conflict, its internal and foreign policy raised concerns for the EU.⁴⁶ Thus, as in the Cold War, pressure from the West was the only effective method of combating these concerns. Therefore, a review of the Strategic Compass is necessary when “*dust settles on the war in Ukraine.*”⁴⁷ Strategic Compass will undoubtedly focus its efforts on the threat posed by Russia, but the EU needs a broader perspective and cannot neglect the Middle East and Africa. This is evident from other conflicts that emerged after the Russian invasion, namely in the Middle East, which gained intensity on October 7, 2023, with the Hamas attack on Israel.⁴⁸

More than a year after the approval of the Compass, HR/VP considers that it has fulfilled the mission it set out to achieve, that is, to show direction and keep the EU on the right path. He also adds that, in the first year of its implementation, significant progress was made in the four chapters of the Strategic Compass (act, secure, invest, partner), blurring the distance between aspirations and reality.⁴⁹

⁴³ Blockmans, S. Crosson, D. & Paikin, Z. (2022). The EU's Strategic Compass: A guide to reverse strategic shrinkage?. CEPS Policy Insights. No. 14/2022.

⁴⁴ Cf.: Witney, N. (2022). Op. cit.

⁴⁵ Koenig, N. (2022). Putin's war and the Strategic Compass: A quantum leap for the EU's security and defence policy?. Hertie School: Jacques Delors Centre.

⁴⁶ Dzurinda, M. (2021). Europe's strategic East: Rethinking the EU's Russia and Eastern neighbourhood policy. European View. Sage Journals. Volume 20. No. 1/2021.

⁴⁷ Blockmans, S. Crosson, D. & Paikin, Z. (2022). Op. cit. P. 9.

⁴⁸ Israel/Palestine: what the EU stands for. Page European Union External Action. https://www.eeas.europa.eu/eeas/israelpalestine-what-eu-stands_en. [05-10-23].

⁴⁹ Annual Progress Report on the Implementation of the Strategic Compass for Security and Defence. Page European Union External Action. https://www.eeas.europa.eu/sites/default/files/documents/2023/StrategicCompass_1stYear_Report.pdf. [07-10-23].

Marques

The European Union's Strategic compass – a new strategic approach for CSDP or just a reaction based on a war in the neighbourhood?

Regarding security and defence, EU investment has been increasing since 2018 and 2019, corresponding to 1.4% of the Gross Domestic Product (GDP), and in the years 2020 to 2022, it increased to 1.6% of GDP.⁵⁰

⁵⁰ Explore All Countries – European Union – Europe. Page CIA. <https://www.cia.gov/the-world-factbook/countries/european-union/>. [05-10-23].

5. Research Gap

The EU Strategic Compass desires to allow the EU with the means and capabilities to execute the EUGS. Nevertheless, the global geopolitical environment is changing, with several challenges, such as the rise of regional powers, unstable vicinity, and problems associated with multilateralism, leading to the need to assess the effectiveness of the Strategic Compass in light of these developments. Despite the diversity of studies related to the Strategic Compass, there is a need to investigate and study how the EU strategy is being adopted to deal with issues such as global competition, cyber security, tensions on eastern borders, and the EU's capacity to influence events and promote their interests on the international stage.

6. Research Questions

The Central Question (CQ) of this essay is, “Is the European Union’s Strategic Compass a new strategic approach to the CSDP or just a reaction based on a war in the neighbourhood?” For a complete answer, three derived questions (DQ) were formulated: i. What are the difficulties in implementing the Strategic Compass? (DQ1); ii. What are the strengths and weaknesses of the Strategic Compass? (DQ2); iii. What is the EU’s position concerning NATO after the Strategic Compass? (DQ3).

7. Methodology

A systematic review of the literature was carried out according to the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) methodology.

A systematic review is a rigorous approach that aims to achieve a relevant systematization of available studies to evaluate them critically. Thus, it materializes in a methodology that guarantees validity and reliability.⁵¹ A qualitative approach was also adopted to evaluate and compare the results to advance existing knowledge.⁵² At the same time, this is qualitative research whose intention is to explore a complex set of factors that affect the central object of the research.⁵³

The search was carried out using the EBSCOhost search engine with the databases Academic Search Complete, Business Source Complete, Engineering Source, International Security & Counter Terrorism Reference Centre, Military & Government Collection, Library, Information Science & Technology Abstracts, ERIC, Regional Business News, Medline, and Teacher Reference Centre, in the first week of October 2023. The keyword used was “strategic compass” to obtain the most significant number of studies related to the topic. All existing articles were included, totalling 153 articles from 2013 to 2023. After applying inclusion and exclusion criteria, 17 articles were selected for analysis, as shown in Figure 2.

⁵¹ Creswell, J. (2009). *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches*. Sage Publications. 3rd edition.

⁵² Snyder, H. (2019). Literature review as a research methodology: An overview and guidelines. *Journal of Business Research*. Elsevier. Volume 104.

⁵³ Cf.: Creswell, J. (2009). *Op. cit.*

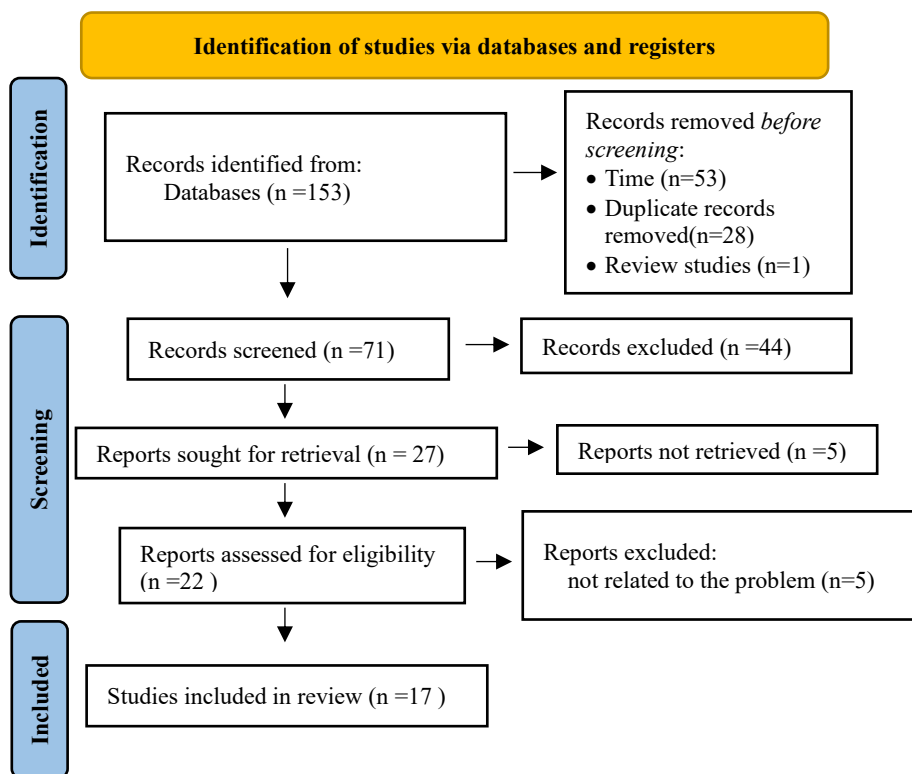


Figure 2: Identification of studies via databases and registers⁵⁴

⁵⁴ Figure created by the author.

8. Research and Results of Research

8.1. Implementation Difficulties

In implementing the Strategic Compass, it is noticeable that the requirement for consensus on the part of all MS was an obstacle to the definition of a common strategic culture since not all MS see the world and threats similarly.⁵⁵ This lack of political will has resulted in a lack of capacity, coherence, and clarity.⁵⁶ Some sceptics consider this document as just another attempt, in an endless line of attempts, to demonstrate strength on the international scene⁵⁷ since this is not the first attempt, as it follows the 2003 documents (European Security Strategy (ESS)) and 2016 (EUGS), as can be seen in Figure 3.⁵⁸

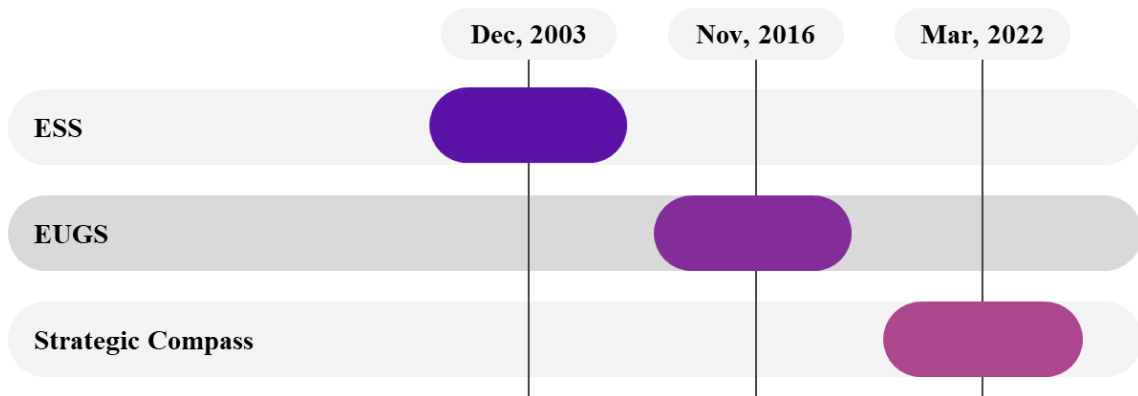


Figure 3: EU Documents⁵⁹

Recent events in Europe and its vicinity area have conditioned developments, not only the War in Ukraine but also the Brexit, the recent pandemic, the increase in inflation,

⁵⁵ Borrel, J. (2022). A Strategic Compass to make Europe a Security Provider. European Union External Action.

⁵⁶ Cf.: Sweeney, S. & Winn, N. (2022). Op. cit.

⁵⁷ Brânda, O. (2022). The Strategic Compass – A Strategic Boost of Confidence in European Security. Romanian Military Thinking International Scientific Conference. Centrul tehnic-editorial al armatei. 4th edition.

⁵⁸ Constatinescu, M. Dumitrache, V. & Popa, B. (2022). The EU Strategic Compass-Between Strategy and Action Plan, at the Crossroads of the old and the new. Defense Resources management in the 21st Century. International Scientific Conference.

⁵⁹ Figure created by the author.

population growth, and the redistribution of global power.^{60 61 62} These were some of the causes of tensions, but they were also responsible for strengthening strategic development.⁶³ The most significant difficulty in implementing the Compass and achieving strategic autonomy is that, at this moment, any decision must be taken in line with NATO and the USA.⁶⁴ Considering the EU is less capable than its competitors, mainly due to the lack of political consensus for innovation, the EU needs to make effort to develop technology.⁶⁵

8.2. Strong and weak points

With the launch of the Strategic Compass, several authors studied its strengths and weaknesses. Right after its construction, Joint threat analysis was carried out for the first time and should be praised.^{66 67} The strategic vision explained in concrete actions, defined with objectives and deadlines, demonstrates an ambition to develop the EU's capabilities. Unlike its predecessors, the Compass is a document that adapts to security challenges; however, without its implementation, it will be just another document.⁶⁸

The fact that the document needs to address security from an economic point of view, particularly in food and energy, is exposed as a weakness.⁶⁹ In this sense, this gap contrasts with the military aspects, which are well-defined. Despite the intention to invest more and better, it needs to be specified where the funds for this investment come from.⁷⁰

⁶⁰ Cf.: Brânda, O. (2022). Op. cit.

⁶¹ Negoită, S. (2022a). O nouă paradigmă de securitate în Europa. *Monitor Strategic*. Editura Militară. Volume 1. No. 2/2022.

⁶² Negoită, S. (2022b). O Europă „mai puternică și mai capabilă” în domeniul apărării și securității. *Monitor Strategic*. Editura Militară. Volume 3. No. 4/2022.

⁶³ Cf.: Negoită, S. (2022a). Op. cit.

⁶⁴ Akşemsettinoglu, J. (2023). The EU's Thought to Develop an Independent Security and Defense Policy and the Strategic Compass. *Jandarma ve Sahil Güvenlik Akademisi Güvenlik Bilimleri Enstitüsü. Güvenlik Bilimleri Dergisi*. Volume 12. No. 1/2023.

⁶⁵ International Institute for Strategic Studies. (2022). *Defence innovation and the European Union's Strategic Compass*. International Institute for Strategic Studies. Routledge: Taylor & Francis Group. Volume 28. No. 10/2022.

⁶⁶ Cf.: Constatinescu, M. Dumitrache, V. & Popa, B. (2022). Op. cit.

⁶⁷ Cf.: Sweeney, S. & Winn, N. (2022). Op. cit.

⁶⁸ Cf.: Constatinescu, M. Dumitrache, V. & Popa, B. (2022). Op. cit.

⁶⁹ Cf.: Brânda, O. (2022). Op. cit.

⁷⁰ Cf.: Constatinescu, M. Dumitrache, V. & Popa, B. (2022). Op. cit.

Economic growth and energy security are pillars of the EU. However, there are weak points not highlighted in the Strategic Compass.⁷¹

There are reasons for optimism. However, the role and ambitions of the EU in its CSDP must be clarified, especially concerning the relationship with NATO.⁷²

8.3. Relationship with NATO

The relationship with NATO is highlighted as one of the gaps in the document and, consequently, a subject of controversy. In the analysis of the document, it is possible to find expressions such as “reduce dependencies,” essentially in the sense of achieving strategic autonomy.⁷³ After the Brexit, cooperation between the EU and NATO became more relevant. However, to reduce dependences other bilateral and multilateral relations should not be neglected, namely with the USA, UK, India, Australia, Japan, and South Korea.⁷⁴

Despite discussions about whether this initiative aims to balance the EU with the US on the international scene, this idea is refuted since, given the common ideals and values of the EU and the US, the EU does not see the US as a threat, but rather as a partner with whom EU can act together on various issues.⁷⁵ US President Joe Biden praised the strengthening of European capacity to complement NATO.⁷⁶ Therefore, European efforts' success in gaining relevance in the international security and defence panorama depends on solid cooperation with NATO.⁷⁷

Since current threats are not restricted to the borders of States, NATO itself needs to strengthen its partnerships to face hybrid and cyber threats, emerging technologies, climate change, and energy crises.⁷⁸ With the development in security and defence, the EU intends to achieve autonomy to choose its destiny and become a strong partner for

⁷¹ Gjoreski, I. (2023). Geopolitical Trends in Europe and EU Strategic Compass. Security Dialogues. Volume 14. No. 1/2023.

⁷² Cf.: Sweeney, S. & Winn, N. (2022). Op. cit.

⁷³ Cf.: Brânda, O. (2022). Op. cit.

⁷⁴ Cf.: Sweeney, S. & Winn, N. (2022). Op. cit.

⁷⁵ Cf.: Akşemsettinoglu, J. (2023). Op. cit.

⁷⁶ Cf.: Borrel, J. (2022). Op. cit.

⁷⁷ Cf.: Negoitã, S. (2022b). Op. cit.

⁷⁸ Gjoreski, I. & Nacev, Z. (2022). Global Security Trends in Euro-Atlantic Area and NATO New Strategic Concept. Security Dialogues. Volume 13. No. 2/2022.

NATO, managing to share the “burden” of creating international peace and security.⁷⁹ Thus, the development of the EU's CSDP does not aim to rival the USA or NATO;⁸⁰ on the contrary, it aims to complement it even because this strategic partnership assumes relevance for the EU. However, for this partnership to be effective, efforts must be synchronized to avoid duplication of capabilities.⁸¹

8.4. The Strategic Compass and Conflict

In the contemporary world, threats know no borders, and States cannot respond alone to the complex problems that arise.⁸² The outbreak of war awakened the MS to the need for a common strategic culture and the perception that diplomacy does not always work and, sometimes, power must be fought with power.⁸³

Russian aspirations to re-establish the power held during the Soviet Union period do not date back to February 24, 2022. Some events such as i. the aggression against Georgia in 2008; ii. the annexation of Crimea in 2014; iii. the military intervention on Ukrainian territory in 2014; and iv. the presence of military forces in Moldova indicates that Russia had not abandoned its expansionist policy.⁸⁴ In this continuity, given Ukrainian aspirations to belong to the EU and NATO, the Russian leader decided to invade Ukraine to avoid having a land border with NATO.⁸⁵ The invasion was based on a lack of cohesion between the EU and NATO. However, cooperation intensified, and the response was severe in supporting Ukraine.⁸⁶

It is unquestionable that the initiative to draft the Strategic Compass arose before the Russian aggression and that its purpose is to achieve the objectives assumed in the Treaty of Lisbon and the 2016 EUGS.⁸⁷ Although the literature does not consider the Compass

⁷⁹ Cf.: Gjoreski, I. (2023). Op. cit.

⁸⁰ Cf.: Akşemsettinoglu, J. (2023). Op. cit.

⁸¹ Cf.: Gjoreski, I. (2023). Op. cit.

⁸² Cf.: Akşemsettinoglu, J. (2023). Op. cit.

⁸³ Cf.: Brânda, O. (2022). Op. cit.

⁸⁴ Cf.: Gjoreski, I. & Nacev, Z. (2022). Op. cit. & Cf.: Negoită, S. (2022b). Op. cit.

⁸⁵ Cf.: Negoită, S. (2022a). Op. cit.

⁸⁶ Duță, A. Dan, A. & Crețu, V. (2022). Relația Transatlantică În Era Competiției Marilor Puteri. Implicații Pentru România. *Infosfera – Revista de studii de securitate și Informații pentru Apărare*. Volume 14. No. 1/2022.

⁸⁷ Ilinca, D. (2023). Participarea statelor terțe la implementarea obiectivelor politicii de Securitate și Apărare Comună. *Monitor Strategic*.

a legitimate response to the invasion of Ukraine, there is no doubt that this conflict demonstrated the importance of security for the EU, as it is being fought on European soil.^{88 89} It is also true that this event affected its development, so Table 1 summarizes the arguments of various authors regarding how the document was affected.

Author	Result
Gjoreski, 2022	The outbreak of the conflict forced the EU to act quickly and decisively. It highlighted the need to strengthen CSDP and the ability to respond to other threats, particularly hybrid ones.
Brânda, 2022	Despite the references to the conflict in Ukraine on the first page of the document, it was written before the document's start. Therefore, the guidelines are not correlated with the reality after the invasion of Russia.
Constantinescu et al., 2022	Compass identifies Russia as the main threat to the EU's security.
Gal, 2022	Russia's conflict against Ukraine has shaken the security and defence context around the world.
Ilinca, 2022	The document was based on studying the effects of Russian aggression.
Tani, 2022	The crisis triggered by the Russian invasion provided the necessary fuel to accelerate the document's development.
Håkansson, 2022	The Ukraine conflict acted as a catalyst for significant advances; it served as a trigger for faster developments.
Akşemsettinoglu, 2023	The environment of insecurity in Europe following the Russian invasion made it necessary for the EU to act.

Table 1: Arguments regarding changes to the Strategic Compass after the invasion of Ukraine⁹⁰

⁸⁸ Cf.: Gjoreski, I. & Nacev, Z. (2022). Op. cit.

⁸⁹ Cf.: Gjoreski, I. (2023). Op. cit.

⁹⁰ Table created by the author.

9. Discussion of Results (pros and cons) and personal

Conclusions

The context in which the Compass began to be thought of was characterized by instability, leading the HR/VP to state that *“the EU’s neighbourhood is in flames with crises from Belarus to the eastern Mediterranean that demand an urgent united response from member states.”*⁹¹ Thus, this instability occurred at several critical points in Ukraine and along the EU’s external border.

Regarding DQ1, for a proper implementation of the CSDP, cohesion between the MS is necessary, with the most significant difficulty being reaching a consensus. However, the outbreak of the war in Ukraine had an influence, playing a catalyst role for the MS to reach a consensus. At the same time, joint analysis played a determining role in ensuring that the MS were in tune.

Responding to DQ2, the Strategic Compass is an added value; however, it could be more explicit about the EU's ambitions. Since it comes from a joint analysis of threats, it strengthens cooperation between MS within the scope of the CSDP, as it provides a framework of common objectives, contributing to a coordinated response to common threats. The greatest weakness identified is the neglect of economic and energy security, which, despite its importance for the EU, is not emphasized in the document, contrasting with the military aspects.

Answering the DQ3 concerning the relationship between the EU and NATO, Strategic Compass does not conflict, as it does not intend to compete but rather to complement, as, in general, the objectives are shared. In this way, the fact that Compass aims to improve the EU's capabilities does not mean that the EU intends to replace NATO but rather to complement it.

To answer the CQ of the research, although the Strategic Compass was drafted before the conflict in Ukraine, an event of this magnitude shook the entire world. The Strategic

⁹¹ Peel, M. & Hall, B. (2020). EU’s neighbourhood ‘engulfed in flames’, warns foreign policy chief. Page Financial Times. <https://www.ft.com/content/aeab4c81-50d3-4aaa-9bf1-e6593b394047>. [08-10-23].

Compass wasn't different, as it affected a document that was in the final stages of its construction and had to be adapted in a race against time.

This focus on the conflict is immediately observable in the document. However, it is refuted that Strategic Compass is a response to the Russian invasion of Ukraine; this answers the CQ. Despite this, the reality is that after around two years of development, the invasion drastically changed the threats predicted in 2020. Regarding strategic terminology, it cannot be said that the Strategic Compass is indeed a strategic document, but rather a *modus operandi*, that is, it aims to provide the EU with the means and capabilities to execute the EUGS; therefore, it seeks to answer the question "how?". This document is innovative because it is the first EU document that approaches prospective; it defines the conditions and level for the desired capabilities to be built and implemented. Thus, it is not a strategic document but contains the operationalization process.

Finally, given the above, the EU cannot forget that the conflict between Russia and Ukraine is not its only threat and cannot be its only concern.

10. Annexes

10.1. List of abbreviations

AUKUS – Australia, United Kingdom, United States

CQ – Central Question

CSDP – Common Security and Defence Policy

DNA – Deoxyribonucleic Acid

DQ – Derived Question

EII - European Intervention Initiative

ESS - European Security Strategy

EU – European Union

EUGS – European Union Global Strategy

GDP - Gross Domestic Product

HR/VP – High Representative of the European Union for Foreign Affairs and Security Policy/Vice-President of the European Commission

MS – Member States

NATO – North Atlantic Treaty Organization

NUPS – National University of Public Service

PRISMA – Preferred Reporting Items for Systematic Reviews and Meta-Analyses

UK – United Kingdom

USA – United States of America

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10.4. List of Literature

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Marques

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11. Affidavit

I declare that I have written the present essay independently and on my own. I have clearly marked any language or ideas borrowed from other sources as not my own and documented their sources. The essay does not contain any work that I have handed in or have had graded as a previous scientific paper earlier on.

I am aware that any failure to do so constitutes plagiarism. Plagiarism is the presentation of another person's thoughts or words as if they were my own – even if I summarise, paraphrase, condense, cut, rearrange, or otherwise alter them.

I am aware of the consequences and sanctions plagiarism entails. Among others, consequences may include nullification of the essay, exclusion from participation in the CSDP Olympiad. These consequences also apply retrospectively, i.e. if plagiarism is discovered after the essay has been accepted and graded. I am fully aware of the scope of these consequences.

Signature

A handwritten signature in black ink that reads "Miguel Marques". The signature is written in a cursive style and is positioned above a horizontal dotted line.

(2nd Lieutenant Miguel Marques, Undergraduate)

Lisbon, Portugal in November 2023