

THE EUROPEAN PEACE FACILITY AND ITS CONTRIBUTION TO EUROPEAN STRATEGIC AUTONOMY

INTRODUCTION

The increasing tensions between Russia and Ukraine since 2014 created a deteriorating security environment for the EU as well. This, and the negotiations on the new Multiannual Financial Framework (MFF) opened a niche for the creation of a more adequate answer to the issue of financing EU CSDP action, and widening the scope of the geographically limited APF. The EU started the formulation of its new tool, the European Peace Facility (EPF) in 2017 accordingly, and established it in 2021.

Financing the Common Security and Defence Policy (CSDP) military missions and operations of the EU was always a contentious issue for Member States. The limitation of financing EU CSDP missions and operations has become tangible when deploying those in crisis situations. As the EU budget cannot be used for financing military operations, other tools were required. The African Peace Facility (APF) was created in 2003 (ACP-EC Council of Ministers 2003) and the Athena Mechanism in 2004 (European Council 2004). In the framework of these financial instruments the provision of lethal equipment (weapons or ammunition) was not allowed (FIOTT 2018). The African Peace Facility was created to provide assistance to the African Union in development and peace support with re-distributing the unallocated budget of the European Development Fund (ACP-EC Council of Ministers 2003). In 2021 the EPF replaced the AFP and the Athena Mechanism. The common costs of military missions and operations were financed through the off-budget Athena Mechanism between 2004 and 2021. This tool was not designed to cover 100% of the costs, but only about 10–20% of them on average. Otherwise, costs fall where they lie, meaning that Member States are responsible for their own expenses to finance their own participation in EU CSDP missions and operations (FIOTT 2018).

The Russian invasion of Ukraine in 2022 set the EPF in motion among other instruments. As a result, the total budget ceiling was increased and reached more than EUR 17 billion for the period between 2021 and 2027. This is more than a three-fold increase since the establishment of the tool in 2021 with a budget ceiling of EUR

5.69 billion (European Council 2021a). It has become one of the most important EU tools to finance Ukraine to be able to defend its territorial integrity and protect citizens against the Russian aggression. In the framework of the EPF, EUR 6.1 billion have been mobilised for the military support of Ukraine (European Commission 2023; 2024). To be able to finance this, following multiple budget ceiling raises, listed in Table 1, in March 2024, the Council of the European Union decided to increase the financial recourses of the European Peace Facility again by EUR 5 billion, and secure this support for Ukraine, by creating the Ukraine Assistance Fund (UAF) inside the EPF (Council of the European Union 2024). It is worth mentioning that the flexible decision-making tool of the constructive abstention was used by the neutral countries (Austria, Malta and Ireland) and by Hungary during the decisions regarding the EPF.

Table 1. *EPF budget ceilings, raises, UAF budget*

EPF budget ceiling March 2021 (billion EUR)	EPF budget ceiling raise March 2023 (billion EUR)	EPF budget ceiling raise June 2023 (billion EUR)	EPF budget ceiling raise March 2024 (billion EUR)	Total EPF budget ceiling (billion EUR)	UAF budget (billion EUR)
5.69	2.29	4.06	5	17	6.1

Source: Compiled by Mariann Tánczos based on European Council data.

With the implementation of the EPF, the European Union provided lethal equipment to a partner country for the first time. This decision is deemed to be in accordance with international law, particularly in light of the context of self-defence and collective countermeasures against the violation of international law (RUTIGLIANO 2022: 404–405).

In this chapter the historical background, the financial and institutional framework, the decision-making processes and the implementation of the EPF are introduced.

THE BIRTH OF A NEW TOOL

In June 2017, based on the experience of the European External Action Service (EEAS), a Task Force was established to revise all the financial tools available to the service. The aim of the Task Force was to better align these tools to the priorities and consequently improve financial support for the EU's set objectives in the field of the CFSP. As a result of the revision, the Athena Mechanism was examined, and

in 2018, then High Representative for Foreign Affairs and Security Policy (HR/VP), Federica Mogherini introduced the idea of the European Peace Facility (EPF) to replace it (PUIG SOLER 2021: 103). The HR/VP has a primordial role in proposing new decisions regarding CFSP and CSDP. Accordingly, the new financial instrument was mentioned first officially by HR/VP Mogherini at the “Building on Vision, Forward to Action: Delivering on EU Security and Defence” event in Brussels, in 2017. Mogherini said that the EEAS and the European Commission were preparing the next MFF for the period between 2021 and 2027, and the HR/VP would propose the establishment of the European Peace Facility, “financed and managed together with [our] Member States”. The main goal of the new financial tool was to plan and deploy EU military missions more efficiently, and also “to support partners in dealing with our shared security challenges” (European External Action Service 2017). In November 2018, the Council of the European Union endorsed the proposal, and invited the preparatory bodies to continue the elaboration of the new tool (European Council 2018).

Meanwhile, negotiations on the 2021–2027 MFF started. During the negotiations, the EPF was established to be an off-budget tool, with a planned EUR 10.5 billion financial framework (MOLNÁR 2019: 233). Besides the Athena Mechanism, the EPF included the African Peace Facility as well. It did so to enhance solidarity and to arm the EU with a more flexible and comprehensive tool (SERRANO 2020: 34). In February 2018, the European Commission published its ambitious priorities regarding the seven-year long budgetary period. The document emphasised that although the European Defence Fund had the potential to increase the EU’s strategic autonomy and the competitiveness of European defence industry. However, due to the restrictions of the EU Treaties, the EU budget is not able to finance all EU actions in the field of security and defence. That is why a “separate funding mechanism of around EUR 10 billion for the 2021–2027 period” to complement other programmes financed directly by EU budget was proposed in order to increase “the EU’s ability to financially support operations with defence implications” (European Commission 2018a). The Commission Communication “A Modern Budget for a Union that Protects, Empowers and Defends” (May 2018) proposed explicitly the creation of the European Peace Facility in order to improve the impact, effectiveness and sustainability of the EU actions in the field of Common Security and Defence Policy (European Commission 2018b). In December 2020, the EU Council reached a political agreement to use the European Peace Facility to finance military and defence-related external activities as well. The proposed new tool, the EPF, together with the also newly established Neighbourhood, Development, and International Cooperation Instrument (NDICI), supports partner countries in the prevention

and management of crises, strengthening their resilience. Following the negotiations, the EPF was established on 22 March 2021, with the budget of 5.69 billion EUR for the 2021–2027 MFF (European Council 2021a).

Main changes introduced

Besides melting two previously existing tools together, significant changes had been introduced in the EPF. The new off-budget financial instrument, although not in the EU's official budget, but financed by the Member States directly, was prepared to become part of the EU's crisis management toolbox. It aimed to make the EU "a more efficient and responsive global security provider". The new instrument is funded by Member States' annual GNI-based contributions (European External Action Service 2018; DENECKERE 2019). The budget of the EPF was designed in order to be available for the common costs of CSDP military operations and for Assistance Measures in support of third countries or international organisations. It facilitates rapid deployment outside the EU and supports flexibility (PUIG SOLER 2021: 103–109).

The new instrument consists of two pillars, as it is used for the financing of 1. common costs of military missions or operations; and 2. assistance measures for third countries. In the framework of the first pillar, the Athena Mechanism, the funding of the CSDP military missions and operations was brought under the new instrument. Regarding these developments, the budget increased, and up to 30% of the operational costs of the military missions and operations could be covered instead of the former 10 to 20%, as well as some expenses of the European Union's Battlegroups (EU BGs). The common costs which can be covered under the EPF are in the logistics, administrative and infrastructural area. This means transportation to and from the operational theatre, obtaining buildings for accommodation and headquarters, medical costs, communication and acquisition of information. The pool of common costs did not change significantly, only the running costs, and the costs of redeployment were added to its scope. Additionally, the funding of added commonalities of the costs of the EU BGs appeared in the new financial tool. This includes redeployment transport, running costs and a deployment readiness package for 10 days. Besides this, the EPF can also finance military exercises (European Council 2021a). The changes in the funding of CSDP military missions and operations took an immediate effect: in July 2021 when the EUTM Mozambique was established, the EPF was decided to cover 45% of the common costs of the mission (European Council 2021b: 4).

The changes introduced to the APF pillar were even more significant. The territorial limitations¹ of the former tool were abandoned completely. The EPF allows financial support for partner countries both in Africa and the EU's neighbourhood and beyond to strengthen their resilience (PUIG SOLER 2021: 103–109). Eventually, the EPF became a global tool, together with the NDICI. This fits into the EU's Global Strategy of 2016, which described the EU as a responsible global actor of security and prosperity (European External Action Service 2016: 17–18). However, the most debated and significant change in the tool is the possibility to provide lethal platforms (concrete military support) in a bilateral manner to third countries. This is a feature which was not possible under the framework of the APF, or any other EU instrument, including the Instrument Contributing to Stability and Peace before (BERGMANN–MÜLLER 2021: 1676). The Africa related Cotonou Partnership Agreement,² which has a trade pillar, introduced everything but arms trade policy in 2000 to support the enforcement of United Nations' arms embargos (VECSEY 2019: 71). The framework of the agreement reached until 2023, and the new framework agreement, the Samoa Agreement was signed on 15 November 2023 (European Council 2024a). The new agreement also abandoned the *everything but arms policy*, fitting well into the “strategic reorientation” of the Strategic Compass (FIOTT 2023: 450).

The provision of lethal platforms to EU partner countries was widely criticised since the introduction of the tool. First, during the negotiations of establishing the EPF, some Member States, like neutral countries opposed the possibility of providing lethal platforms, while others saw this as an opportunity to boost their arms export. Thus, accusations emerged that the EU moved forward in the CSDP area imperfectly, and too fast (BERGMANN–MÜLLER 2021: 1670). Others claimed that the EPF became the EU's primary funding tool to provide financial support for military purposes outside of the EU's borders (FOTIDIADIS–SCHMIDT 2022). Further criticism highlights that the new tool closed a niche for countries like Turkey and Russia to provide lethal weapon platforms to African countries. The EPF is enhancing hard security, which fits into the integrated approach (FERRANDO 2021: 2). The war

¹ The African Peace Facility was created to support the African Union solely, even though the decision to create it was made in the framework of the cooperation between African, Caribbean and Pacific Group of States and the European Union (ACP-EC Council of Ministers 2003), thus in its original form the tool could not finance any assistance measures applied outside of Africa.

² The Cotonou Partnership Agreement (CPA) was signed on 23 June 2000 between the EU and 79 members of the African Caribbean and Pacific Group of States, originally running for 20 years. The CPA rested on three pillars, development cooperation, political cooperation, and economic and trade cooperation (VECSEY 2019: 70–71).

in Ukraine and recent developments in regard to the allocation of the EPF budget changed the perspectives. It became one of the main tools to support Ukraine. The budget of the EPF also complements other EU programmes with a security and defence focus or component, together with the European Defence Fund, the NDICI and the Connecting Europe Facility, which has a separate allocation for the Military Mobility.

The EU topped up the EPF multiple times, the last time so far on 18 March 2024 by EUR 5 billion, which sum is allocated to the newly established Ukraine Assistance Fund, which is a multi-annual envelope in military support under the European Peace Facility (EPF). The new financial instrument was proposed by HR/VP Josep Borrell during the Informal Foreign Affairs Council on Defence in August 2023 (BORRELL 2023; 2024: 89). After heated discussions Hungary decided to use constructive abstention during the final vote in the Council of the European Union, which allowed to establish this new tool (BARIGAZZI 2024).

In 2024 the EPF has a total budget over EUR 17 billion for the period 2021–2027 (European Council 2024b). The assistance measure pillar of the EPF was utilised in favour of 26 entities until September 2024, mostly countries, but the African Union mission in Somalia and the Balkan Medical Task Force were also included (European Council 2024b). Although the majority of available resources supports Ukraine, Table 2 shows that the geographical scope of the tool is indeed wide, the EPF is utilised as intended, as a global tool. The main geographical focus remains on the Neighbourhood Policy region and Africa. The table shows that since the outbreak of the war in Ukraine a significant shift towards the east occurred, more funds were allocated to Ukraine through the assistance measure pillar of the EPF.

The management of the EPF

The EPF being a tool of the Common Foreign and Security Policy, the European Council and the Council of the European Union (the Council) set the strategic priorities along which the EPF action must be organised and the Council primarily makes decisions regarding the EPF. The EPF as an off-budget tool remains dependent on Member State decision on the operations, assistance measures and finance (European Council 2021a: 19–20). Although the Council decides unanimously, financing does not have to happen by all member states. According to the council decision on establishing the EPF, if a Member State chooses to abstain from a vote,

Table 2. *EPF assistance measures adopted between 2021 and 2024*

2021		2022		2023		2024	
Entity	Assistance measure (million EUR)	Entity	Assistance measure (million EUR)	Entity	Assistance measure (million EUR)	Entity	Assistance measure (million EUR)
African Union	130	African Union	600	Georgia	30	Moldova	50
Mozambique	44	Mozambique	60	Moldova	40	African Union mission in Somalia	70
Bosnia and Herzegovina	10	Bosnia and Herzegovina	10	Ukraine	2,500	Mauritania	15
Georgia	12.75	Georgia	20	African Union mission in Somalia	85	Somalia	40
Moldova	7	Moldovan Armed Forces	40	Niger	44.7	Benin	35
Moldovan Armed Forces		Ukraine	3,116	Jordan	7	Ghana	25
Ukraine	31	Balkan Medical Task Force	6	Somalia	26	Côte d'Ivoire	15
Mali	24	African Union mission in Somalia	120	North Macedonia	9	Kenya	20
		Niger	25	Democratic Republic of the Congo	20	Albania	13
		Lebanon	6	Benin	11.75	Armenia	10
		Mauritania	12	Yaoundé Architecture	21	Ukraine	5,000
		Rwanda	20				

Source: Compiled by Mariann Tanczos based on European Council data.

it is not obliged to contribute to the financing of the operation in question based on Article 31(1) and Article 41(2) of the Treaty of the European Union (TEU 2008: 33; European Council 2021a: 19). The EPF has

“legal capacity, in particular to hold bank accounts, acquire, hold or dispose of assets, supplies and services, employ staff, enter into contracts, agreements and administrative arrangements, discharge its liabilities and be a party to legal proceedings, as required in order to implement this Decision. The Facility shall not have the purpose, or the effect, of making a profit” (European Council 2021a: 18).

This latter statement is important in light of the assistance measures provided to Ukraine, which required further tools to enhance transparency.

The large scale support to Ukraine raised concerns about the transparency of the new tool, since it is argued that the EPF has no sufficient control and oversight. Directly diverted from this, Maletta and Héau argued that the use of the tool as an arms trading platform will worsen the security situation in already volatile regions (MALETTA–HÉAU 2022: 2–8). EU Member States moreover provided weapon systems and equipment from their own, existing stocks, which did not necessarily meet the needs of the Ukrainian army. To address this problem, and provide Ukraine with useable and needed weapons, the EU Military Staff set up a mechanism to control and coordinate the supply and demand. Under this pretext Ukraine can send its requests, which specify which equipment is needed, and Member State donations can be sent accordingly (BILQUIN–IMMENKAMP 2022).

The EPF is under the management of the Facility Committee, which is “composed of a representative of each Member State”. This body includes an administrator for operation, the operation commander of each operation, an administrator for assistance measures and an accounting officer for operations and an accounting officer for assistance measures. The Secretary-General of the Council provides the administrator for operations and the accounting officer for operations together with the staff. The HR/VP is responsible for ensuring the implementation of Council decisions. In order to implement the assistance measures (with the exception of assistance measures implemented by an operation) the HR/VP is assisted by the administrator for assistance measures and the accounting officer for assistance measures. The High Representative exercises this responsibility with the support of the European Commission (European Council 2021a: 21).

The European Commission also has a crucial role in the administration of the EPF. The Service for Foreign Policy Instruments within the European Commission

“acts as administrator for assistance measures. The Commission also acts as accounting officer and internal auditor for assistance measures through the Directorate-General for Budget and the Internal Audit Service respectively. The administrator is in charge of the financial implementation of assistance measures” (European Commission 2024).

The Facility Committee (EPF Committee) is chaired by a representative of the rotating presidency of the Council. The EPF Committee adopts the annual budget and the amending budgets of the Facility, it also approves the annual accounts. The EPF Committee’s decisions are binding (European Council 2021a: 22–23).

THE EPF AS A TOOL OF STRATEGIC AUTONOMY IN THE CONTEXT OF CSDP MISSIONS AND OPERATIONS

The Russian aggression in Ukraine in 2022 can be considered a game changer for European defence. The new financial instrument allowed the EU to become a real security provider. It had an impact on both capability development and political decisions regarding the future of European defence. Although it was criticised for militarising the European Union, it has become the flagship for military support of Ukraine (KARJALAINEN–MUSTASILTA 2023). The Strategic Compass of 2022, while its drafting started before the outbreak of the war in Ukraine, was rewritten according to the EU’s security situation to become the Union’s first dedicated security and defence strategy. Its uniqueness also shows in its reception. This time, besides the European Commission, which endorsed multiple conclusions in this policy area, EU Heads of State and Government also welcomed the document. The Compass, besides openly naming Russia as a threat to the EU’s security, drew up over 80 priority actions, one of them to scale up the EU’s military action (FIOTT 2023: 450). One of the most important tools in this regard fell to the EPF, which was seen in the Compass as a financial instrument to enable CSDP action (Council of the European Union 2022: 17).

The EPF has fulfilled its role with mixed results so far, as it covers the common costs of the EU CSDP military missions and operations at a varying rate. This amount can, however, be significantly higher than the Athena Mechanism contribution before. As of September 2024 four military missions and four military operations were eligible to benefit from the EPF, as well as a recently established Coordinated Maritime Presence, the EU Security and Defence Initiative in support of West African countries of the Gulf of Guinea (EU SDI GoG) (European External Action Service 2024a). Regarding EU CSDP action in the military domain, Africa seems to be the primary geographical area, with seven military interventions of some

Table 3. *EU military missions and operations benefiting from the EPF*

No.	Military mission (non-executive) ³	Military operation (executive)	Other (coordinated maritime presence)
1.	EUMAM Mozambique	EUFOR Althea	EU SDI GoG
2.	EUTM RCA	EUNAVFOR MED Irini	
3.	EUTM Somalia	EUNAVFOR Atalanta	
4.	EUMAM Ukraine	EUNAVFOR Aspides	

Source: Compiled by Mariann Tánczos based on European External Action Service 2024a.

kind on the continent, or in the vicinity of its shores, based on the list provided by Table 3. The remaining two military missions are located in Europe, one of them deployed close to, and the other within the EU's borders.

EPF financing shows a wider scale of variation among the missions and operations than their geographical location. EUMAM Mozambique, the most recent mission of the EU, established on 1 September 2024, did not inherit the 45% of EPF contribution for the common costs from its predecessor, EUTM Mozambique. The EU decided to cease EPF funding for the mission due to its transformation to an assistance model (European Council 2024c). Despite their eligibility, EUMAM Mozambique is not the only EU mission or operation which does not receive EPF funding. EUTM Somalia is also not benefiting from EPF funds (European Council 2022a). EUNAVFOR Atalanta falls into the same category with no funding allocated to it from the EPF (European Council 2022b). Although the EPF was hailed as an instrument to provide significant contribution for financing CSDP military action, regarding EUNAVFOR MED Irini the Council decided to set the reference amount of common costs provided by the EPF at only 15% of the total EUR 16.9 million (European Council 2023a). EUTM RCA was granted with a reference amount of EUR 5.84 million in common costs until 19 September 2025, of which 30% can be financed under the EPF (European Council 2024d). EUNAVFOR Aspides, the EU's most recent military operation got EUR 8 million as the reference amount of common

³ The distinction between non-executive and executive mandates are related to the tasks the different military missions and operations carry out. In this sense, non-executive mandates are focused more on advisory and training tasks operating from the background. While executive military operations are taking over the tasks or acting instead of local security forces (TSITSIKOSTAS 2021: 87; HORNYÁK–TÁNCZOS 2024: 119).

costs, of which 60% can be financed through the EPF (European Council 2024e). The Coordinated Maritime Presence at the Gulf of Guinea, however, containing a civilian and a military pillar is eligible for funding from the EPF. The military pillar of the EU SDI GoG was set at EUR 179,000 reference amount of common costs, of which 45% can be financed by the EPF (European Council 2023b).

While EPF contribution to CSDP missions and operations shows a rather mixed image, it must be assessed in comprehension with the provided Assistance Measures. Data on EUFOR Althea do not provide information on the financial amount provided by the EPF, notwithstanding the host country did not remain without funding from the instrument. The EU contributed assistance measures to Bosnia and Herzegovina both in 2021 and 2022 with the total amount of EUR 20 million. Mozambique also received funds from the EPF Assistance Measures pillar in 2021 and 2022 with the total sum of EUR 104 million. Somalia is in a similar situation, however, in addition to adopted assistance measures benefitting the country, the African Union mission in Somalia also received significant financial support in 2023 and 2024 from the EPF, totalling EUR 221 million. Additionally, the African Union also received EUR 730 million altogether from the EPF during 2021 and 2022. This amount could also be allocated to African Union missions, like the one in Somalia (DINCĂ 2023: 135–137). It must also be considered that these sums of funding, just as with the EPF funding of CSDP military missions and operations can be used in a specified time period, for example the funding of EUTM RCA is defined for one calendar year (European Council 2024d).

In the context of Ukraine, two CSDP missions were active in 2024. The EUAM Ukraine, a civilian mission funded through the Common Foreign and Security Policy budget was established in 2014 (European Council 2014). The EUMAM Ukraine, however, is a military mission, providing training for the Ukrainian military. The idea to deploy an EU training mission to Ukraine first emerged in 2021, when Kyiv turned to HR/VP Josep Borrell for assistance. Consensus was not reached among the Member States in 2021 about establishing a new training mission because of the uncertain situation at the Northeastern borders of Ukraine (WAGNER–VECSEY 2022: 4).

The unprovoked Russian aggression against Ukraine on 24 February 2022, changed the situation significantly, and the European Union Military Assistance Mission in the support of Ukraine was launched on 17 October 2022, with Hungary's constructive abstention from the vote (HOEFFLER et al. 2024: 3238).

“The strategic objective of EUMAM Ukraine shall be to contribute to enhancing the military capability of Ukraine's Armed Forces (UAF) to regenerate and to effectively conduct operations, in order to allow Ukraine to defend its territorial integrity

within its internationally recognised borders, effectively exercise its sovereignty and protect the civilians in Ukraine” (European Council 2022c: 87).

As a military capacity building and training mission, the Military Planning and Conduct Capability is the operations headquarters of EUMAM Ukraine. The mission, however, has a not-so-usual element, as it is deployed within the borders of the European Union as a temporary measure. All activities are conducted within the framework of a multinational Combined Arms Training Command (CAT-C) headquartered in Poland, a multinational Special Training Command (STC) responsible for training activities in Germany, and in various locations across the European Union. It is a unique feature, since according to Article 42(1) of the Treaty on the European Union, CSDP action must take place outside of the territory of Member States (WAGNER-VECSEY 2022: 6; European External Action Service 2024b).

The EUMAM Ukraine mission also benefitted from the EPF in multiple ways. Assistance Measures were provided through the mission since its establishment in 2022 worth EUR 255 million (European External Action Service 2024b). The financial reference amount of common costs for the duration of the two-year-long mandate was set at EUR 106.7 million, of which 30% goes for commitments and 30% for payments. Besides the military operations pillar, the EPF plays a key role in complementing the work of the EU’s CSDP effort in Ukraine with financing assistance measures as well. The transportation costs of the Ukrainian Armed Forces from Ukraine to the training bases in Germany and Poland, between training locations and return, real life support, medical expenses and evacuation are financed by the EPF. These are costs which can fit under the EPF common costs in the active phase of the mission. However, the Council also decided to cover some operational costs, including personal training kits besides petroleum, and maintenance of the equipment used in training temporarily from EPF budget (European Council 2022c: 90). Altogether, the European Peace Facility provides the following equipment and services through EUMAM Ukraine: ammunition, unspecified military equipment, lethal platforms for defensive purposes, transportation and maintenance (European External Action Service 2024b). At its establishment, the objective of the mission was to train 30,000 soldiers by the end of 2023 (HOFER 2023: 1703). The estimated figure of trained troops was even higher, reaching 40,000 by the end of the year as a result of the EU’s efforts (NIZHNIKAU-MOSHES 2024: 496). By May 2024, the number of UAF personnel trained by EUMAM Ukraine reached 52,000, the equivalent of 15 brigade units, and the EU expected to conclude the training of two more brigade units until the end of summer in the same year (European External Action Service 2024b). The EU provides both individual and collective training

to UAF personnel at different levels, from basic training to specialised levels as junior leadership training from section to brigade level. EU training also includes operation training from company to brigade level, including live fire exercises (European Council 2022c: 87).

THE IMPORTANCE OF THE EPF FOR EUROPEAN STRATEGIC AUTONOMY IN THE CONTEXT OF THE RUSSO–UKRAINIAN WAR

The Member States could provide lethal weapon systems for a country under attack for the first time under any EU financial instrument. This novelty, however, brought its own problems, since bilateral aid was not well coordinated and supply initially failed to meet demand. With the establishment of the clearing house cell under the EU Military Staff, the situation was normalised, and Ukraine could update its list of demands daily. Besides solving issues in the supply and demand realm, it must be noted that under the EPF, Member States can be reimbursed for their donations (BILQUIN–IMMENKAMP 2022; HOFFFLER et al. 2024: 3237). This does not mean a complete reimbursement, just a certain percentage. At the beginning of 2022 an initial 85% reimbursement was planned, but the quickly mounting sum in assistance measures for Ukraine (it jumped from EUR 31 million in 2021 to EUR 3.1 billion in the course of 2022) caused a significant drop in the figures. In October 2022 calculations showed that a maximum of 46% of the costs could be reimbursed (BARIGAZZI 2022). This was, however, only the start of the reform of the EPF. During the course of 2024, further changes were negotiated in order to establish a more fitting tool to support Ukraine. Germany requested the amount of bilateral donations to be deduced from the reimbursable costs, and France demanded further restrictions, namely that only EU made equipment can be funded through the EPF framework. While the German request was partially met, allowing the reimbursement of 50% of bilaterally provided equipment, the French demand is likely to become the norm in the long-term (HOEFFLER et al. 2024: 3237; BARIGAZZI 2024).

The Strategic Compass, besides underlying the importance of the EPF in financing military operations, makes it clear that the assistance measure pillar of the tool is also important. This importance translates into providing lethal platforms to the partners of the EU to support EU military action in the respective regions. The Compass views the EPF as a tool to complement the Neighbourhood Development and International Cooperation Instrument, building defence capacity globally (Council of the European Union 2022: 44). The EPF, with providing lethal platforms thus

started a *defensive weaponisation* of the EU's partners under its Assistance Measures pillar (FIOTT 2023: 449).

Launched in 2021, the EPF has proved to be a very flexible tool when it came to European action. Its global scope, off-budget nature, and the two pillars (military operations and assistance measures) provided the EU with a very adaptive instrument (HAUCK 2022; FIOTT 2023: 451). The focus of the EPF had been shifted in response to the war in Ukraine. While previously it was considered the main tool to finance African peace and security projects, by 2022 it was clearly a tool to support the Ukrainian war effort (HAUCK 2022). Until the end of 2022, the EU provided EUR 3.1 billion in six tranches, each including a package of approximately EUR 500 million, of which EUR 450–490 million was covering lethal platforms and the remaining EUR 10–50 million financed equipment and supplies, for example protective gear, fuel, first aid kits and even maintenance and repair for previously donated assets (WAGNER–VECSEY 2022:8). These data show that flexibility was needed regarding both pillars of the EPF, since first the geographical scope shifted from Africa to Ukraine, then the Assistance Measures pillar gained momentum, as it is shown in Table 2.

On 1 February 2024, the European Commission confirmed its strong commitment towards supporting Ukraine, which translated into the establishment of the Ukraine Assistance Fund. The total budget of the EPF was raised to EUR 17 billion for the period between 2021 and 2027. Within it, by 2024 the EU provided a total of EUR 6.1 billion military support to Ukraine through the EPF (European Commission 2023; 2024). A total of EUR 11 billion will be allocated to Ukraine from the EPF budget, while the remaining sum will be available to support other regions globally (BARIGAZZI 2024). Although Member State contributions far surpassed the EPF, standing now at EUR 32.9 billion (European Council 2024f), the EPF created a common European brand, and despite the fact that the institution of constructive abstention was practiced by the neutral countries of Austria, Malta and Ireland, it contributed to enhanced solidarity within the EU (HOEFFLER et al. 2024: 3236–3237). Norway also contributed to the support of Ukraine through the EPF. Two tranches of voluntary support were announced, the first in October 2022 to the EUMAM Ukraine, and the second in February 2023 to support Ukraine through the Assistance Measures pillar of the EPF. The first tranche of support was EUR 14.5 million, while the second amounted to EUR 22 million (European Council 2023c).

The allocated money, however, is not spent immediately. On the establishment of the EPF, the Council of the European Union determined annual financial ceilings, by allocating the budget evenly in the period of 2021–2027. With the extensive support to Ukraine and the increased budget of the EPF, the yearly financial ceiling also changed, however, the aim to keep it somewhat even remained, which is visible from Table 4.

Table 4. *The evolution of EPF yearly financial ceiling*

	2021 (million EUR)	2022 (million EUR)	2023 (million EUR)	2024 (million EUR)	2025 (million EUR)	2026 (million EUR)	2027 (million EUR)
24 March 2021	420	540	720	900	980	1,000	1,132
13 March 2023	399	591	980	1,800	1,375	1,400	1,434
26 June 2023	399	591	980	2,785	2,380	2,425	2,480
18 March 2024	399	591	980	2,785	4,047	4,092	4,146

Source: Compiled by Mariann Tánczos based on European Council 2021a; 2023d; 2023e; 2024g.

The Council of the European Union established the Ukraine Assistance Fund on 18 March 2024 after intense negotiations with Member States to meet all requests. The Ukraine Assistance Fund was established within the framework of the EPF, providing a dedicated tool for the support of Ukraine only, with the benefit of regulating rules of contribution and reimbursement separately from the general EPF budget. In practice it means that the earlier mentioned German request of limited reimbursement of bilateral donations, and the French request regarding prioritising EU and Norway made equipment were embedded in the new tool. Additionally, to avoid veto caused deadlocks in the financial support for Ukraine, those Member States who earlier abstained from a vote are not contributing to the budget of the Ukraine Assistance Fund, but should make additional contributions to other assistance measures (European Council 2024g).

The allocated money, however, does not translate into hard cash immediately. Member States have to conclude contracts which include the detailed rules on payments. The payments can be requested in several instalments, lump sums, or they can be delayed for even several years (WAGNER–VECSEY 2022: 9). Besides the hard contracts on coordinated donations, the EPF also includes elements of “creative accounting”, as future annual contributions for the EPF can be deduced from the contributions, meaning that if a Member State donates equipment to

Ukraine it can count it as contribution to the EPF, and pay less to the actual budget with that amount (HANKE VELA – CHIAPPA 2024).

Despite the difficulties in decision-making, budget allocation and contributions, the EPF is considered an important tool not just for providing assistance for Ukraine. The EPF can also be seen as a tool to boost EU defence industry cooperation and arms modernisation. These can be explained through the detailed regulations of the EPF and the Ukrainian Assistance Facility. Firstly, Member States can be reimbursed for their donations to Ukraine, of which the benefit can be twofold. Soviet-era (operational) weapon systems and ammunition were welcome in Ukraine, which created a market for these items. Member States have been, or will be reimbursed to some extent for their stock sweeping. Moreover, the incoming, or unspent budget can be translated into the procurement of modern military equipment both on the national and EU levels (FIOTT 2023: 452). While the donation of obsolete Soviet-era equipment to Ukraine raised questions, the current regulations ensure that nobody loses on the deal.

Secondly, when the Council of the European Union amended the decision on establishing the EPF in 2024, one of the criteria for Member State contribution reimbursement was that the donation must be an EU or Norway made weapon system. This, in itself means that further procurements must be coordinated, and will mean an increased interest in EU made items.

The tools to coordinate defence procurement were discussed during a meeting in Versailles among EU Heads of State and Government on 10–11 March 2022. As Member States started to donate their Soviet-era weapon systems to Ukraine, the need for the replenishment of the stocks had arisen. Of course, modern equipment was agreed to be acquired, preferably from the EU defence industry, and defence spending was to be increased in general. These requirements were met, at least new tools to enhance coordinated procurement were established, like the Regulation for the European Defence Industry Reinforcement through Common Procurement Act. This will allow the creation of the European Defence Investment Programme (FIOTT 2023: 452). All of these developments, however, occurred in the realm of European defence industry and had an indirect connection to the EPF. It is, nevertheless, undebatable that the Russian aggression in Ukraine and the return of conventional war to Europe set the EU's integration in the area of defence into motion.

Despite the interconnectedness of EU tools in the area of defence, the role of EPF in European strategic autonomy can be contextualised in itself. The new financial tool enabled the EU to respond to any crisis globally, stepping in the place of the previously limited scope of the African Peace Facility. EU Member States can provide partners with lethal platforms through the EPF in order to support CSDP action,

eliminating two of the difficulties of EU external actions. Thus, the EU does not have to wait for its global partner's response in order to make a difference on the Ukrainian battlefields. The EPF and the pledges of individual EU Member States were even able to ensure a matching U.S. support to Ukraine in equipment. After Germany announced its decision to send main battle tanks, Leopard 2s to Ukraine, the U.S. followed suit by pledging 31 M1 Abrams tanks (GOULD 2023).

CONCLUSIONS

The Russian invasion created a deteriorating security environment for the EU, and induced a strategic reorientation towards territorial defence within the community. The deeper sense of togetherness stepped up the integration of CSDP, utilising the EPF as a glue to complete the imperfections of the policy area. The employment of the EPF required real solidarity among the Member States because of its off-budget nature, and the need for unanimity in its decision making. The utilisation of constructive abstention made this exceptional financial tool possible to maintain. From 2021 to 2024, it seemed that this heightened sense of solidarity could set the EPF in motion and operationalise it in a unified manner. However, long-term employment of the tool, and a looming strategic fatigue could reintroduce rifts into the utilisation of this instrument (HOEFFLER et al. 2024: 3237).

The total budget ceiling of the instrument was increased three times until 2024 and it reached more than EUR 17 billion for the period between 2021 and 2027. It has become one of the most important tools for Ukraine to defend its territorial integrity and protect citizens against the Russian aggression. In the framework of the EPF, EUR 6.1 billion has been mobilised for the military support of Ukraine so far (European Commission 2023; 2024). With the latest increase of the budget ceiling, in March 2024, the Council of the European Union also decided on the creation of the Ukraine Assistance Fund inside the EPF (European Council 2024b). Although constructive abstention was utilised by multiple countries along the utilisation of the EPF, it is noteworthy that the EU is still committed to supporting Ukraine.

Considering that the war started in early 2022, on 24 February, Ukraine's Western supporters at least in Europe are still interested to provide their eastern neighbour with material to defend its territories and to keep up its war effort. The U.S. shows a slightly different picture in 2024, a presidential election year. Signs of strategic fatigue over the war in Ukraine are also showing in the ongoing U.S. presidential election campaign. It will thus fall to the EU to incentivise on its new-found togetherness to keep Ukraine in the spotlight, and show that it can act autonomously.

The EPF has so far proved to be an important tool in the practical implementation of EU measures. It is indeed a flexible tool, which can be adapted according to the situation, in this case focusing on Ukraine instead of Africa. Both pillars of the EPF, military operations and assistance measures were utilised in order to maximise the EU's efforts in Ukraine. It is yet not clear how these actions contribute to European strategic autonomy, which will fall to future analysis on the question.

In February 2024, Roberta Metsola, President of the European Parliament, during her visit in Athens emphasised:

“Indeed, it's time to reassess our strategic autonomy, ensuring our citizens feel safe and protected, capable of standing on our own. We already possess the European Peace Facility (EPF), and we should explore how we can integrate it into the European framework. A genuine security and defence union is essential, one that complements rather than competes with NATO, preserving the autonomy of each member-state while ensuring collective defence in the event of an attack. This is particularly crucial today. Take a look at events unfolding in the Red Sea, which impact shipping, security, and maritime domains. Discussions are currently under way in the European Parliament regarding the potential upgrading of the Political and Security Committee (PSC) and the creation of a commissioner for defence. In the next Commission term, seamless cooperation between the High Representative of the European Union for Foreign Affairs and Security Policy, a commissioner for defence, and the European Parliament should be prioritized” (KOSTULAS 2024).

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