

**EUROPEANISATION AND THE UKRAINE CRISIS: THE IMPACT OF THE EU ON HUNGARIAN
AND POLISH FOREIGN POLICIES, 2014–2024**

by

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ABSTRACT

The thesis considers the foreign policies of Hungary and Poland towards Russia and Ukraine to examine their Europeanisation during the Ukraine crisis between 2014 and 2024. It contributes to the Europeanisation literature by investigating whether and to what extent the foreign policies of Hungary and Poland were Europeanised during this period. By considering the European Union's Eastern policy as the least likely case of Europeanisation and selecting the divergent foreign policies of Hungary and Poland based on maximum variation case selection strategy, the thesis develops a model of the Europeanisation of foreign policy. It utilises the rationalist logic and argues that policy change at the national level can happen without member states' strict adherence to traditional norms and principles in the EU foreign policy. This research identifies a government's definition of its critical policy preferences as the key intervening variable, which helps determine a member state's EU-level strategy (cooperative or conditional dissent), the mechanisms of policy change (strategic learning, strategic action, issue linkage and hostage-taking) and the Europeanisation outcomes (transformation, adaptation, fragmentation, resistance and no Europeanisation). The empirical analysis triangulates a large amount of primary and secondary data. It demonstrates that the Polish governments' cooperative strategies and compatible national preferences with the EU led to the adaptation outcome of Europeanisation. For its part, while the Hungarian government's cooperative strategy yielded fragmentation, its conditional dissent strategy and growing differences with the EU produced the resistance outcome of Europeanisation. Overall, the thesis showcases that national foreign policy change due to the EU's influence can happen both when there is a significant overlap between the national and EU levels (Poland), and when there is strong opposition to EU-level policy initiatives (Hungary), strengthening the explanatory value of Europeanisation.

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LIST OF ABBREVIATIONS

AA – Association Agreement
ATM – Autonomous Trade Measures
B9 – Bucharest Nine
CEE – Central and Eastern European
CFSP – Common Foreign and Security Policy
CoE – Council of Europe
CSDP – Common Security and Defence Policy
DCFTA – Deep and Comprehensive Free Trade Area
EaP – Eastern Partnership
ECJ – European Court of Justice
ECU – Eurasian Customs Union
EDM – European Defence Mechanism
EEAS – European External Action Service
ENP – European Neighbourhood Policy
EP – European Parliament
EPF – European Peace Facility
ESS – European Security Strategy
EU – European Union
EUAM – European Union Advisory Mission Ukraine
EUMAM – European Union Military Assistance Mission in support of Ukraine
FAC – Foreign Affairs Council
FCO – Foreign and Commonwealth Office
HIA – Hungarian Interchurch Aid
HR/VP – High Representative/Vice President
HRC – Human Rights Council
IMF – International Monetary Fund
IOM – International Organisation for Migration
LCD – Lowest common denominator

LITPOLUKRBRIG – Lithuanian-Polish-Ukrainian Brigade
MFA – Macro-Financial Assistance
MFAT – Ministry of Foreign Affairs and Trade
OUN – Organisation of Ukrainian Nationalists
OSCE – Organisation for Security and Cooperation in Europe
P4M – Partnership for Modernisation
PiS – Law and Justice (Prawo i Sprawiedliwosc)
PO – Civic Platform (Platforma Obywatelska)
QCA – Qualitative comparative analysis
QMV – Qualified majority voting
RCI – Rational choice institutionalism
RRF – Recovery and Resilience Facility
SGUA – Support Group for Ukraine
TPD – Temporary Protection Directive
TSI – Three Seas Initiative
UNGA – United Nations General Assembly
UPA – Ukrainian Insurgent Army
US – United States
V4 – Visegrad Group
WTO – World Trade Organisation

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1. INTRODUCTION

This thesis studies the Europeanisation of Hungary's and Poland's foreign policies during the Ukraine crisis between 2014 and June 2024. It examines whether, and how, the EU's influence altered Hungary's and Poland's national foreign policies in this period, given their initially divergent policy preferences. The research aims to contribute to the current literature on Europeanisation by considering the Ukraine crisis as a tough challenge for the concept. It refines the concept by introducing an interest-based intervening variable, puts forward the new mechanisms of policy change and develops a model of the Europeanisation of foreign policy. This chapter is organised into five sections. It begins by outlining a theoretical and empirical context for the research. The second section presents the objectives and the research questions that drive the study. The third section discusses theoretical considerations, case selection, research design, methods and data collection. Finally, the fourth section outlines the structure of the thesis, and the fifth section provides a summary of this chapter.

1.1. Context for research

1.1.1. Theoretical context

The EU's role in foreign policy has been subject to debates over its actorness and the nature of integration in the area since the institutionalisation of foreign policy cooperation with the

Maastricht Treaty (Blockmans and Koutrakos, 2018; Rhinard and Sjostedt, 2019). In the context of recent crises and geopolitical developments, the EU has been compelled to take more decisive measures in its external relations (Riddervold, Trondal and Newsome, 2021, pp.2-4). These steps have reinvigorated discussions on the evolving nature of the EU foreign policy cooperation (Alcaro and Dijkstra, 2024; Bicchi, Maurer and Raube, 2024; Cross and Karolewski, 2017; Juncos, Pomorska and Lovato, 2025; Maurer, Raube and Whitman, 2024; Orenstein, 2023; Riddervold and Rieker, 2024). At the same time, this evolving cooperation, alongside the EU's responses to recent crises, inevitably call into question the Union's subsequent influence on the foreign policies of member states. Understanding how the EU shapes, constrains or enables national foreign policy is therefore essential for assessing both its effectiveness as an international actor and the limits of member state autonomy. Within this broader context, this study examines the concept of Europeanisation to assess the EU's impact on the foreign policies of member states.

Europeanisation is a complex concept and has been used in various ways by different authors. It has mostly been employed to study the relationship between the EU integration processes and changes at the domestic level (Graziano and Vink, 2013, pp.37-38; Radaelli, 2012, p.1; Tonra, 2015, p.183). In this research, Europeanisation refers to changes at the national level due to member states' participation in the EU, specifically focusing on changes in policy substance. Foreign policy has received relatively less attention than other EU policy areas in Europeanisation studies. The absence of formal enforcement mechanisms and the European Court of Justice (ECJ) jurisdiction has made it challenging for scholars to develop testable hypotheses and identify scope conditions in this area. The largely intergovernmental character

of the EU foreign policy has further complicated the scholarly efforts to apply Europeanisation perspectives developed in other areas to this domain. Hence, by employing the constructivist perspective, the literature has mainly focused on the EU's role as a forum and emphasised a more voluntary nature of changes in member states' national policies through learning and socialisation mechanisms (Baun and Marek, 2013; Czulno, 2021; de Flers and Muller, 2012; Pomorska, 2015; Tonra, 2003).

Nevertheless, the constructivist perspective's primary interest in normative and ideational factors overlooks instances where member states may prioritise their national objectives and resort to traditional bargaining, for which the largely unanimous nature of EU foreign policy-making provides ample opportunity. This study utilises the rational choice institutionalism (RCI) to present and re-examine the strategies of member states and the mechanisms of Europeanisation. It argues that the rationalist logic is more suitable for explaining critically important foreign policy decisions with notable consequences, while the constructivist logic may be better equipped to expound day-to-day, relatively low-intensity and highly technical issues at the EU level. In this sense, the Europeanisation model identifies a member state government's interpretation of a country's national policy objectives as the key intervening variable (see Chapter 2 and Table 1). The outlined rationalist propositions are particularly apposite when considering the EU's reaction to geopolitical crises, such as Russia's destabilisation of Ukraine in 2014 and its full-scale invasion of the country in 2022, which necessitated member states to make critical decisions, reassess their national policies and formulate a common EU position.

1.1.2. Empirical context

The Ukraine crisis, Russia's annexation of Crimea and its full-scale invasion of Ukraine have been crucial landmarks for the EU as a foreign policy actor. The events have posed comparatively different challenges for the EU compared to other international crises it has faced. The EU initially attempted to strike a balance between its policies towards Russia and Ukraine during the 2014–February 2022 period. However, Russia's full-scale invasion completely transformed the EU's Eastern policy,¹ as supporting Ukraine took the utmost priority among its foreign policy objectives.

The EU's Eastern policy between 2014 and February 2022 can be characterised as the best of both worlds, as it was not yet prepared to decouple from Russia and fully prioritise Ukraine (see Chapter 4). The Union condemned Russia's annexation of Crimea and imposed economic sanctions against the country. The Franco-German partnership was the driving force in the EU's foreign policy and held talks with Russia and Ukraine through the Normandy Format to find a peaceful solution to the conflict in eastern Ukraine, which produced two Minsk agreements. The EU's 2016 Five Principles on relations with Russia linked the lifting of sanctions to Russia's full implementation of the Minsk agreements but also included cooperation with Russia in areas of mutual interest (EEAS, 2016a). Concerning Ukraine, the EU supported the country's territorial integrity and democratic transition. It diplomatically backed Ukraine, finalised the signing of the Association Agreement (AA) and the Deep and Comprehensive Free Trade

¹ Although the EU's Eastern policy also encompasses the Eastern Partnership (EaP) countries, in this research the term refers specifically to its policies towards Russia and Ukraine.

Agreement (DCFTA), provided increased security support but stopped short of granting the country a membership perspective until 2022 (Council of the EU, 2014a; Novaky, 2015; also Interviews 2, 5, 11).

Russia's full-scale invasion of Ukraine led to the full reorientation of the EU's Eastern policy. The Franco-German grip on the EU's foreign policy weakened due to their ineffective diplomacy, and the Union's response relied on more coordination among member states. The main contours of the EU's strategy were outlined by the Versailles Declaration and a Strategic Compass for Security and Defence (EEAS, 2022a; European Council, 2022). Economic sanctions and eliminating dependence on Russian fossil fuels were the main elements of the EU's common foreign policy towards Russia, while the EU's common Ukraine policy concentrated on helping the country for as long as it takes through political, military, financial and humanitarian means (see Chapter 4).

Nevertheless, differences among member states persisted regarding the EU's Eastern policy. Division lines have been more unanticipated among the Central and Eastern European (CEE) members in general and the Visegrad Group (V4) countries in particular. It could have been expected that these countries would form a firmer approach against Russian aggression due to security and historical factors. However, the V4's contrasting policy preferences between 2014 and June 2024, and particularly after Russia's full-scale invasion, threatened to turn the Group into a dysfunctional entity (Euronews, 2024; Jack, 2022a; see also Kucharczyk and Meseznikov, 2015). In this sense, differences between Hungary's and Poland's foreign policies were more pronounced. Despite their strong unity against the EU's migration quotas during

the refugee crisis and the Article 7 procedures,² the two countries could not sustain the same level of cooperation towards the Ukraine crisis (see Chapters 5 and 6).

Hungary's and Poland's foreign policies towards Russia and Ukraine significantly varied and represented the opposite ends of the spectrum. Hungary was one of the most sceptical voices towards the EU's Eastern policy and was criticised for its close relations with Russia and opposition to several common EU decisions (Bardi and Cragg, 2021; Buzogany, 2017; Coakley, 2022; Moens et al., 2023; Vela, 2023b). The country, inter alia, attempted to gain concessions from the EU sanctions, opposed opening EU accession talks with Ukraine, maintained energy dependence and good political and economic relations with Russia and remained sceptical about financial and military assistance to Ukraine (see Chapter 5). In contrast, Poland was an ardent supporter of a firmer EU stance against Russia, supported stricter economic sanctions against the country, advocated a clear EU membership perspective for Ukraine and pushed for stronger EU position on political, financial, military and humanitarian assistance to Ukraine (see Chapter 6). The lack of substantial differences between the two countries' foreign policies during the 2014–February 2022 period was largely due to the relatively loose nature of the EU's common foreign policy. As the EU's common position became more resolute following Russia's full-scale invasion, divergences between Hungary's and Poland's foreign policies significantly widened during the February 2022–June 2024 period. Consequently, Poland's

² Article 7 of the Treaty on European Union enables a suspension of a country's membership, including voting rights, if it seriously and persistently breaches EU values specified in Article 2 of the Treaty on European Union. Article 7(2) is triggered by one-third of member states or the Commission and requires the EP's approval by a two-thirds majority. If the Council unanimously decides that there is a serious and persistent breach by the accused state, the Council vote by a qualified majority can suspend the state's membership, including voting rights (European Council, 2025c; European Parliament, 2024).

foreign policy between 2014 and June 2024 was more compatible with the EU's Eastern policy, while Hungary's foreign policy was more of an outlier and consistently deviated (particularly between February 2022 and June 2024) from the mainstream EU position.

Admittedly, the largely intergovernmental nature of the EU foreign policy makes convergence among member states' foreign policies difficult, if not impossible. However, in the face of member states' divergent national policy preferences, the EU managed to achieve unity in responding to Russia and supporting Ukraine. The EU and member states gradually implemented measures that would not have been considered attainable before 2014. The developments may point to the EU's considerable role in shaping member states' national foreign policies, as they largely subscribed to the EU's common foreign policy despite their occasional opposition. However, the question arises as to whether, and to what extent, the EU can account for changes and differences in member states' national foreign policies. In this context, this thesis problematises Hungary's and Poland's contradictory policy preferences between 2014 and June 2024 and examines whether their national policy positions were affected by the EU's influence in foreign policy.

1.2. Research question and objectives

This study is primarily driven by a theoretical objective but inevitably involves an empirical element. Based on the above context, firstly, the research question examines whether, and if so, to what extent Hungary's and Poland's foreign policies were Europeanised during the

Ukraine crisis between 2014 and June 2024. The primary aim is to evaluate the theoretical applicability and the explanatory power of Europeanisation. Due to the least likely case of the Ukraine crisis for Europeanisation (see Section 1.3.3), should the EU's impact on the two countries with significantly different policy positions be identified, it will increase the model's explanatory power and allow us to make generalisations. Secondly, the research question analyses the role of downloading and cross-loading dimensions of Europeanisation in Hungary's and Poland's foreign policies. These two dynamics of the concept enable us to investigate the EU's influence both as a hierarchical policy-making structure and as a forum for policy exchanges among member countries. Thus, the study scrutinises whether the two countries altered their policy positions through downloading, considering EU-level pressures (which is rare in foreign policy), the EU's urgency to respond to the crisis and the severity of Russia's aggression against Ukraine. From the cross-loading perspective, this study examines whether Hungary's and Poland's foreign policies were altered because of their policy exchanges with other member states within various EU frameworks. In this regard, intense contacts within the EU, the V4, and among like-minded member states might have affected the policy positions of Hungary and Poland. The uploading dimension is not part of this study, as its consideration would engender methodological problems and blur the lines between dependent and independent variables in studying Europeanisation (see Section 1.3 and Chapter 2).

Thirdly, the research question explores Europeanisation mechanisms that drive changes in member states' foreign policies. More specifically, it analyses whether the EU's response to the Ukraine crisis and Russia's full-scale invasion changed which mechanisms and strategies

play a role in generating changes in member states' national policies and how they operate. In this sense, it might have been the case that mechanisms other than traditional learning and socialisation led to changes at the national level. Further, member countries' strategies towards EU-level policy initiatives might have also influenced which Europeanisation mechanisms drove policy changes at the national level. Thus, given Hungary's and Poland's disparate foreign policies, separate national strategies and Europeanisation mechanisms might have been responsible for policy changes in the two countries.

The research question is as follows:

Were Hungary's and Poland's foreign policies Europeanised during the Ukraine crisis between 2014 and June 2024, and if so, to what extent and through which mechanisms?

1.3. Theoretical underpinnings and methodology

As has been briefly discussed in the first section, Europeanisation studies have resorted to rationalist and constructivist approaches to explain policy change at the national level. However, ontological and epistemological incompatibilities between the two perspectives make their simultaneous application challenging. This research achieves a division of labour between them by adopting a domain of application approach (Jupille, Caporaso and Checkel, 2003, pp.21-22) and arguing that the rationalist logic is more suitable for explaining member states' choices regarding highly critical policy decisions at the EU level (see Section 2.3).

The model adopted in this study is developed to examine Europeanisation when there is a specific foreign policy initiative at the EU level. In this research, an initiative is defined as a policy developed within the EU towards a country, region or specific policy issue and is used as an umbrella term. It can refer to the EU's common foreign policy or a policy proposed by member states within the EU. The distinction is useful for determining the direction of changes at the national level, as the former indicates the EU's direct influence (downloading), while the latter denotes the potential for policy exchanges among member states within the EU (cross-loading). The model aligns with the research's objective of analysing changes in policy substance rather than policy-making procedures and strategies in member states' national foreign policies (see Chapter 2).

1.3.1. Research design

The study incorporates downloading and cross-loading but does not include the uploading dimension of Europeanisation. The reason for the decision is that adding uploading would mean that the national and the EU levels had to be considered both dependent and independent variables simultaneously, which makes establishing the direction of causality impossible (Moumoutzis, 2011, p.610). Concentrating on downloading and cross-loading dimensions maintains methodological rigour and enables the problematisation of Hungary's and Poland's national foreign policies. Thus, uploading is bracketed and viewed as part of the EU foreign policy-making processes, which are largely dominated by member states. However, the omission of uploading does not entail that the EU foreign policy-making processes are

overlooked. The research pays attention to them to pinpoint EU-level initiatives and then investigate their influence on member states' foreign policies.

This research identifies EU-level policy initiatives as an independent variable and changes in Hungary's and Poland's foreign policies as a dependent variable. EU-level policies may change member states' national foreign policies through their adaptation to common EU policies (downloading) and policy exchanges with other member states' policy positions (cross-loading). Empirically, it suggests that Hungary and Poland might have changed their national policies because of the EU's common policies and strategies towards Russia and Ukraine between 2014 and June 2024. It is also possible that the two countries might have altered their national policies as a result of policy exchanges with other member states at the EU level (see Chapter 2 for an extensive discussion).

This study specifically examines changes in policy substance to assess policy change at the member state level. This means that the focus is on changes in Hungary's and Poland's strategic objectives and national policy positions between 2014 and June 2024 due to the EU's impact. For their part, changes in procedures and strategies (see Baun and Marek, 2013, p.10; Moumoutzis, 2011, p.619) in the two countries' foreign policies are predominantly investigated to determine Europeanisation mechanisms. Thus, in this study, the determining factor of Europeanisation is changes in policy substance, while procedures and strategies act as antecedent conditions for investigating these changes.

Empirically, the research focuses on two broader elements of the EU's foreign policy to explore the Europeanisation of Hungary's and Poland's national policies: policy initiatives towards Russia and Ukraine. They constitute the basis for the empirical analysis in this study. The third chapter aims to provide contextual background for the foreign policies of the EU, Hungary and Poland towards Russia and Ukraine by investigating the period from the early 1990s to 2014. The fourth chapter examines EU-level policy initiatives towards Russia and Ukraine between 2014 and June 2024. For the 2014–February 2022 period, the study investigates the dominance of the Franco-German leadership in the EU foreign policy, the EU's diplomatic response to the Ukraine crisis through the Weimar Triangle and the Normandy Format, sanctions against Russia, limited tangible action to reduce the EU's energy dependence, upgraded cooperation with Ukraine through the AA and DCFTA and security and energy sector support for Ukraine. For the February 2022–June 2024 period, the research explores the EU's changing perception of Russia, the imposition of stricter sanctions, concrete steps to eliminate energy dependence on Russian fossil fuels, the offer of a long-awaited membership perspective to Ukraine and the EU's comprehensive military, financial and humanitarian assistance to the country. The empirical chapters on the Europeanisation of Hungary's and Poland's foreign policies explore the influence of EU-level policy initiatives discussed in the fourth chapter on the two countries' national policies. They are also attentive to country-specific factors that might have affected Hungary's and Poland's views towards EU-level initiatives and contributed to the Europeanisation of their foreign policies. Concerning Hungary, the fifth chapter explores the EU's impact on Hungarian foreign policy by considering the Fidesz government's ideological view of the EU, Russia's place among the country's strategic objectives and the prominence of the minority issue in Ukraine. Regarding Poland,

the sixth chapter examines the EU's influence on Polish foreign policy by evaluating the two Polish governments' (PO and PiS) EU-level strategic objectives, the country's view of Russia and historical issues between Poland and Ukraine.

1.3.2. Process tracing

Ontologically, this research is situated within transcendental realism, which argues that the external world exists independently of our knowledge and cognitive faculties (Bhaskar, 1998, p.17). The main logic behind this ontological position is that unobservable entities may also act as causal mechanisms and generate causally observable outcomes (Bhaskar and Lawson, 1998, p.5). This proposition directly connects with the epistemological choice of the study, which is predicated on scientific realism. Gerring (2012, p.437) defines scientific realism as 'The view that (a) reality exists independently of our knowledge of it and (b) the goal of science is the description and explanation of observable and unobservable aspects of an (independently existing) world'. Thus, according to scientific realism, observable and unobservable causal mechanisms and processes constitute the main aspect of causal explanations (Bennett and Checkel, 2015, p.10). This study's focus on the causal mechanisms of Europeanisation and the conditions under which they operate makes it consistent with the scientific realist approach to epistemology. However, operationalising causal mechanisms also presents an inferential challenge. George and Bennett (2005, p.137) describe it as the difficulty 'to isolate one causal mechanism from another, and more generally, to identify conditions under which a particular mechanism becomes activated.' This research aims to address it by resorting to process tracing.

The scientific realist epistemology provides ‘a possible meta-theoretical basis for process tracing’ (Bennett and Checkel, 2015, p.14). Among other methods of data analysis, process tracing is selected for several reasons. First, it can address the challenge of equifinality in Europeanisation studies (Moumoutzis, 2011, p.621; see also Exadaktylos and Radaelli, 2012). Equifinality means that multiple causal pathways can generate the same outcome in the dependent variable. Process tracing enables to consider alternative explanations and eliminate them to identify the researched phenomenon (George and Bennett, 2005, p.207; Moumoutzis and Zartaloudis, 2016, pp.339-340). While this research adopts process tracing, it uses the method to primarily determine the EU’s impact on the national level, giving only scant attention to alternative explanations. It is acknowledged as one of the limitations of this study in Section 7.2.

Second, process tracing is a useful tool for theory development (George and Bennett, 2005, p.209). It corresponds with this study’s aim to refine the Europeanisation concept through both deductive and inductive logic of inquiry. Deductively, process tracing allows us to refine the Europeanisation concept in the case of Hungary’s and Poland’s foreign policies. As Bennett (2022, p.23) notes regarding the deductive element, ‘the researcher uses theories to predict the values of intervening variables in a case and then tests these predictions’. Inductively, process tracing helps refine prior theoretical expectations when faced with unpredicted puzzles (Bennett, 2004, p.23; George and Bennett, 2005, p.21). Further, the inductive approach can serve to test established theories by assessing their explanatory value and identifying the need for a revised or new theory (George and Bennett, 2005, p.75; see the section on case

selection). The rationale behind employing deductive and inductive reasoning is that while the current literature offers some insights into Europeanisation of foreign policy, there is no specific and well-established model to analyse it. Thus, the research firstly proceeds deductively and presents a preliminary model of the Europeanisation of foreign policy. Secondly, in the empirical chapters, inductively collected data and evidence are used to examine the initial theoretical considerations. The simultaneous usage of induction and deduction when developing a theory reduces tensions between theoretical expectations and real-world data and aims to minimise the eventual incompatibility between them (Schwartz-Shea and Yanow, 2011, pp.27-29).

Third, process tracing relies on establishing an uninterrupted causal path between independent and dependent variables (George and Bennett, 2005, p.222). It helps identify causal mechanisms that can explain the Europeanisation of foreign policy (Collier, 2011, p.824). This becomes possible by establishing a causal chain and treating EU-level initiatives as an independent variable, the Hungarian and Polish governments' strategic objectives, strategies and mechanisms of policy change as intervening variables, and changes in Hungary's and Poland's foreign policies as a dependent variable in the causal chain (see George and Bennett, 2005, p.206). In this way, intervening variables are connected to each other to explain the case (George and Bennett, 2005, 207). As Radaelli and Exadaktylos (2010, p.198) note, 'In order to assess the contribution of the variables from outside the domestic system, the researcher goes 'up' – from the domestic level to the EU – and controls for the causal patterns. Causality is examined *in vivo* by looking at temporal causal sequences (emphasis in original)'.

Fourth, process tracing can be utilised as an instrument of causal inference. It explains events that happen over a long time by offering snapshots of specific moments in the sequence (Collier, 2011, p.824). It ‘focuses our attention on those episodes that offer the possibility to discriminate between competing theories and to collect data that are needed for this purpose’ (Schimmelfennig, 2015, p.107). Process tracing examines diagnostic evidence and enables us to concentrate on a limited number of essential steps to analyse the selected case (Collier, 2011, p.823; Schimmelfennig, 2015, p.107). Thus, in this study, process tracing assists in finding key changes in Hungary’s and Poland’s foreign policies that are associated with the EU’s impact between 2014 and June 2024.

Several alternative qualitative methods for data analysis were considered but ultimately not adopted, including, qualitative content analysis, qualitative comparative analysis (QCA), hypothesis testing and congruence analysis. Qualitative content analysis is useful for a comprehensive description of a phenomenon, but it offers limited leverage for identifying causal mechanisms or reconstructing temporal sequences of decision-making (Dey, 1993, p.32; Lune and Berg, 2017, pp.182-183). Because this study seeks to trace how the EU shaped national foreign policy positions, a method capable of generating causal-process observations is required.

QCA, by contrast, is designed to identify cross-case configurations of conditions that are necessary or sufficient for an outcome (Schneider and Wagemann, 2012). However, its set-theoretic logic and need for a broader case universe make it inappropriate for a two-case within-case study focused on uncovering causal mechanisms rather than comparing patterns

across multiple cases. Similarly, hypothesis testing is not considered because it presupposes a fully specified theory with clear, measurable predictions, which generate observable implications (Mearsheimer and Walt, 2013, p.434). Given that the Europeanisation model in this study is theoretically unsettled and one of the aims of this study is to refine it, a predictive, variable-oriented research design with its emphasis on probabilistic logic of causation would be premature (Mearsheimer and Walt, 2013, p.434). As the study is driven by a research question that is explanatory rather than predictive, it does not employ a hypothesis-testing design, and a mechanism-focused, process-tracing approach is therefore more appropriate for uncovering whether and how Europeanisation may occur and for refining the Europeanisation model itself.

For its part, congruence analysis is primarily suited to assessing whether empirical outcomes are congruent with the expectations of competing theories (Blatter and Haverland, 2012, pp.160-169). While valuable for theory testing, it does not reconstruct the causal processes through which outcomes are produced. Because the objective of this study is to identify and evaluate Europeanisation mechanisms along with the EU's impact at the national level, process tracing, rather than pattern matching logic of congruence analysis, better aligns with the exploratory goals of this thesis because it reconstructs within-case sequences and causal-process observations (see Collier, 2011, p.824; Schimmelfennig, 2015, p.107).

The investigation in empirical chapters proceeds in three steps. First, EU-level policy initiatives towards Russia and Ukraine, their content, objectives and actions taken by the EU and member states are examined. They help determine the independent variables and the first step in the

causal chain and identify policies for examining changes in Hungary's and Poland's foreign policies. Domestic conditions do not constitute a separate independent variable in this research. They are analysed to specify the two countries' starting national foreign policy positions, after which the EU's influence on them is assessed. In other words, the national policy positions are framed as a black box without being subjected to a causal analysis. Second, Hungary's and Poland's initial national policies towards EU-level Russia and Ukraine policies are ascertained to conduct a before-and-after analysis. The analysis proceeds by examining the strategic objectives of the Hungarian and Polish governments. After this, the focus shifts to investigating their perceptions of the relevance of EU-level policies to their strategic objectives and their respective strategies (cooperative or confrontational) towards these policies' implementation based on their negotiating positions. These steps offer clues about the causal mechanisms between the independent and the dependent variables in the causal chain. Finally, Hungary's and Poland's national policies towards Russia and Ukraine are compared with EU-level initiatives towards these two countries. This helps assess whether and to what extent Hungary and Poland changed their national foreign policies because of the EU's influence. The last step provides us with the dependent variable (the outcome of Europeanisation) and completes the causal chain.

1.3.3. Case selection

The empirical analysis of Europeanisation covers the period between 2014 and June 2024. Theoretical and practical considerations inform the selected date range for this study. Theoretically, it is important to consider both the 2014–February 2022 period and the period

following February 2022, as the EU's more decisive policies after Russia's full-scale invasion might have had a different influence on Hungary's and Poland's foreign policies, which enables the examination of the complexity of Europeanisation. However, as Russia's invasion shows no sign of ending, an explicit cut-off point for data collection is necessary to ensure the feasibility and timely completion of this research. June 2024 is selected based on practical considerations, such as the project deadline and the challenge of collecting and analysing data in a timely manner after that point. The selected timeframe captures the key developments that are sufficient to address the research objectives and support meaningful analysis.

This research considers the EU's Eastern policy between 2014 and June 2024 as the least likely or tough case of Europeanisation. Gerring (2007, p.115) defines a least likely case as 'one that, on all dimensions *except* the dimension of theoretical interest, is predicted not to achieve a certain outcome, and yet does so' (emphasis in original). It is a crucial case design and is predicated upon the fact that the event is more decisive than others in developing a theory (Levy, 2008, p.12). 'It is a case that *must closely fit* a theory if one is to have confidence in the theory's validity, or, conversely, *must not fit equally* well any rule contrary to that proposed' (emphases in original) (Eckstein, 2000, p.148). There are two closely related reasons for designing this research based on the least likely case selection. First, member states still maintain significant leeway in the conduct of their national foreign policies, and the EU's role in foreign policy remains relatively limited compared to other policy areas. Moreover, due to the largely unanimous and intergovernmental nature of the EU foreign policy decisions, it could have been expected that member countries would try to safeguard their national policy

positions during negotiations by exercising their veto power (Manners and Whitman, 2000, p.11; Pomorska, 2011, p.178).

Second, constant differences among member states regarding the EU's common foreign policy towards Russia and Ukraine (Howorth, 2017, p.2; Schmidt-Felzmann, 2008, 2014; Sjursen and Rosen, 2008; Thaler, 2020) could have made it difficult to agree on an approach that would subsequently change member countries' national policies. Some member states' preferences for bilateralism in their relations with Russia and Russia-first strategies (Bottger, 2019, p.45; David, Gower and Haukkala, 2013, p.2; Nitoiu, 2016, p.378; Schmidt-Felzmann, 2008) could have limited the EU's Eastern policy following 2014. As Manners and Whitman (2000, p.11) note, member states may try to 'ring fence' their special policies towards certain countries or issue areas and keep them outside the EU's policy processes. The theoretical implication of the least likely design is that if the Europeanisation of Hungary's and Poland's foreign policies is detected, it will significantly increase the concept's explanatory value (Levy, 2008, p.12; Schimmelfennig, 2015, p.105). Conversely, the lack of support for Europeanisation in Hungary's and Poland's national policies will not substantially damage the proposed model's assumptions, as the EU's Eastern policy between 2014 and June 2024 constitutes a least likely case

The selection of Hungary's and Poland's foreign policies to examine Europeanisation is based on a maximum variation (or heterogeneity) case selection strategy. The main aim is to explore the Europeanisation of foreign policy from contrasting perspectives. This approach helps unearth the divergent conditions under which the concept may operate and investigate

different potential mechanisms leading to Europeanisation. The maximum variation strategy identifies cases by determining key variations that differ significantly from each other (Patton, 2014, p.234). Seawright and Gerring, who define it as a diverse case method, note that its main goal is 'the achievement of maximum variance along relevant dimensions' (2008, p.300). Hungary's and Poland's foreign policies towards Russia and Ukraine were diametrically opposed in the period under study. The relative similarity of the two countries' historical, geographical and security-related characteristics makes it easier to conduct a controlled comparison between the Europeanisation of their foreign policies.

1.3.4. Data collection

In the absence of formal enforcement mechanisms in the EU foreign policy, detecting a change in policy substance in member states' foreign policies can be difficult. This research utilises primary and secondary data sources to overcome this challenge. Official policy documents such as the EU Council conclusions, joint communications by EU institutions, issue papers and common strategies specifying the EU's position towards Russia and Ukraine help explore EU-level initiatives as this study's independent variable. Statements by the Presidents of the Council and Commission and the HR/VP are also considered in determining the EU's official position on the Common Foreign and Security Policy (CFSP) matters. Further, documents that are not officially published but obtained by reputable media sources, such as FT, EUobserver, Euractiv, Euronews and Politico, help determine the EU's stance and member states' positions on these policies. These media publications are also used to gain a preliminary understanding of the EU's common Russia and Ukraine policies and EU-level discussions and negotiations.

Secondly, official documents and public speeches by actors representing Hungary and Poland in foreign and security policy are investigated to ascertain whether and to what extent the two countries' national policies were influenced by the EU's impact. Regarding documents, priority is given to foreign policy and national security strategies, documents presenting the two countries' reactions and responses to EU-level policies, non-papers, policy proposals and annual addresses delivered to national parliaments by government officials. In terms of foreign policy actors, the study primarily focuses on prime ministers, foreign ministers and defence ministers. Additionally, diplomats at the COREPER II, the Foreign Affairs Council (FAC), the Working Group on Eastern Europe and Central Asia (COEST), the Political and Security Committee (PSC), senior party members, government advisors and ambassadors are viewed as officials representing the dominant elite opinion. The research is also supported by a large body of academic literature, articles, opinion pieces, policy reports and the aforementioned reputable media sources, which contribute to a broader understanding of the topic under investigation.

Although official documents and secondary data are valuable sources of information, they may provide only a superficial understanding for assessing Europeanisation. As such, they do not offer in-depth insights into decision-making processes and strategies that might have been adopted by Hungary and Poland regarding EU-level initiatives. Moreover, because of the confidential character of foreign policy, the EU and member states mostly restrict access to their archives and relevant documents. Therefore, this study also resorts to semi-structured elite interviews to investigate Europeanisation. By constituting a part of historical process

tracing, interviews help corroborate the accuracy of data collected from other sources, collect rich data on elite opinion, draw general conclusions about broader elite beliefs and actions and reconstruct events based on elite responses (Tansey, 2007, pp.766-767). Further, they enable us to inductively analyse whether the causal process expected by a theory is 'evident in the sequence and values of the intervening variables in that case' (George and Bennett, 2005, p.6, 18). From this research's perspective, while it is relatively easier to discern EU-level initiatives and Hungary's and Poland's strategic policy objectives through secondary data, EU-level negotiations and the two countries' strategies and the mechanisms of policy change are not readily available. Hence, elite interviews are used to gather information that could not be obtained through primary and secondary data.

A semi-structured interview is described as 'an interview with the purpose of obtaining descriptions of the life world of the interviewee in order to interpret the meaning of the described phenomena' (Kvale and Brinkmann, 2008, p.3). It allows a researcher to start with general themes and is flexible to organise the follow-up questions based on an interviewee's responses (Saunders, Lewis and Thornhill, 2019, pp.437-438). Interviews conducted for this research generally began with an open-ended format using what, how or why questions. These were followed by more specific questions to explore emerging themes in greater detail. As Harvey (2011, p.434) notes, asking open-ended questions at the beginning of elite interviews is advisable as they 'do not like to be confined to a restricted set of answers'. This structure gives interviewees more freedom to speak about the topic and allows the interviewer to explore matters of essential interest when they arise (Brinkmann, 2013, p.21; Bryman, 2012, p.471). Thus, interviews complement information gathered through primary and secondary

data, and triangulation of multiple data sources helps us gain a full understanding of specifically politically sensitive issues (Davies, 2001, cited in Natow, 2020, p.161). Interviews help the data collection process both inductively and deductively. Inductively, they facilitate the development of insights from emerging patterns, while deductively, the core focus of interviews is structured around the research's theoretical underpinnings (Saunders, Lewis and Thornhill, 2019, p.438).

A total of thirty interviews were conducted for this research. All took place online through video conferencing platforms, such as Zoom and Microsoft Teams. The interviewees from Hungary and Poland were current and former diplomats representing the two countries' foreign ministries and PMs' offices, policy advisors, policy experts and academics familiar with the policy-making processes through their regular contacts. They were specifically selected from individuals with deep knowledge of Hungary's and Poland's foreign policies towards Russia, Ukraine and EU-level policies. The interviewees from the EU included current and former diplomats with the authority to speak on EU-level policy initiatives towards Russia and Ukraine in the period spanning before 2014 through June 2024.

Background knowledge was gained on the research topic, and information about the interviewees' current and former work experiences was gathered from self-reported information (e.g., CVs, LinkedIn profiles, personal websites), official and institutional records, and media publications in order to adapt the interview questions and enhance the value of findings (Kvale and Brinkmann, 2008, p.147). The questions were prepared by consulting with the relevant academic and empirical literature and were based on interviewees' backgrounds

and relevant themes related to the research questions (Rapley, 2007, p.17). Interviewees were provided with a general list of themes and questions to promote the credibility of the research and allow them to prepare for the interview (Saunders, Lewis and Thornhill, 2019, p.452). Ethical issues were reflected in the participant information sheets and consent forms. Interviewees were granted complete anonymity to be able to speak freely on sensitive issues, and their names were replaced with broader personal identifiers (see Annex 1). Further, confidentiality was ensured by encrypting and keeping the collected data at the University's secure servers. Whenever interviewees gave permission, the interview was recorded and transcribed. In instances where interviewees declined to be recorded, detailed notes were taken and subsequently shared with them to verify their accuracy and ensure alignment with the interviewees' intended responses.

1.4. Thesis structure

The thesis comprises seven chapters. This chapter presents the research questions and objectives and discusses the methodological issues. The second chapter puts forward this study's conceptual and theoretical foundations by reviewing the literature and developing a model of the Europeanisation of foreign policy. The third chapter investigates the foreign policies of the EU, Hungary and Poland towards Russia and Ukraine from the 1990s to 2014 to provide empirical background. The fourth chapter concentrates on EU-level policy initiatives towards Russia and Ukraine between 2014 and June 2024, setting the scene for examining their influence on Hungary's and Poland's foreign policies in the following two chapters.

Chapters five and six focus on Hungary and Poland, respectively, and investigate the EU's impact on their foreign policies, the downloading and cross-loading dimensions of the concept, the mechanisms of policy change and the outcomes of Europeanisation. The concluding chapter summarises the findings of this research, discusses its significance, contributions and limitations and offers avenues for future research.

1.5. Summary

The introductory chapter provided an overview the research problem on the Europeanisation of foreign policy. First, it presented a brief theoretical and empirical context for investigating the EU's impact on Hungary's and Poland's foreign policies between 2014 and June 2024. Second, the chapter introduced the research objectives and research questions. It identified exploring the Europeanisation of Hungary's and Poland's foreign policies as the study's primary objective. Further, analysing downloading and cross-loading dimensions and examining mechanisms of change were highlighted as complementary to studying Europeanisation. The third section outlined this research's theoretical underpinnings by discussing the research design and methodological issues. Here, the EU's collective response to the Ukraine crisis was advanced as the least likely case of Europeanisation. For their part, Hungary's and Poland's foreign policies were selected based on a maximum variation case selection strategy. EU-level policy initiatives towards Russia and Ukraine between 2014 and June 2024 were identified as empirical cases to study the Europeanisation of Hungary's and Poland's foreign policies. Regarding methods, process tracing was presented as the main tool to explain the causal

relationship between the EU's influence and changes in Hungary's and Poland's foreign policies. Additionally, the section highlighted primary and secondary data as the main sources of the research and advocated data triangulation. Lastly, the fourth section outlined the structure of this thesis.

2. THEORETICAL FRAMEWORK

This chapter establishes an analytical framework to investigate the EU's impact on Hungary's and Poland's foreign policies. In this sense, the study is driven by the concept of Europeanisation, which, in this research, is defined as changes at the domestic level due to member states' participation in the EU. The literature has demonstrated how EU-level developments may generate policy changes in member states, and most studies have largely focused on gradual Europeanisation processes through changes in policy-making procedures and strategies. However, the link between EU-level policy initiatives and changes in foreign policy substance has been less clear-cut. This thesis specifically problematises changes in policy substance. The chapter develops a model of Europeanisation compatible with these considerations. It is structured as follows. The first section briefly discusses definitional issues regarding Europeanisation and delineates the concept from other similar explanations. The second section analyses the application of Europeanisation to foreign policy, presents the dimensions of the concept, defends cross-loading and downloading and discusses changes in foreign policy substance. The third section considers an RCI perspective for studying the concept and reviews its relevance for examining the Europeanisation of foreign policy. The fourth section introduces a new model of Europeanisation of foreign policy, describes cooperative and conditional dissent strategies and outlines the mechanisms and the outcomes of the concept, while the last section briefly summarises the chapter.

2.1. Definition of Europeanisation

Different terms have been used to describe the EU's influence on member countries. Authors have employed Brusselisation (Allen, 1998, p.51, 59), Europeification (Andersen and Eliassen, 1993) and EU-isation (Hay, 2004, p.252) to explain the impacts of the EU membership. Others (Major, 2005, p.178) have taken a broader approach and included other international organisations and frameworks in Europe in their definitions of the concept. In this study, I use the term Europeanisation to investigate how EU-level foreign policy initiatives might have influenced Hungary's and Poland's foreign policies. This definition is similar to EU-isation, which focuses solely on the EU's impact on member states (see Flockhart, 2010 for a detailed comparison). However, considering the established use of the term as the domestic impact of the EU (Exadaktylos and Radaelli, 2015; Graziano and Vink, 2013; Ladrech, 1994; Radaelli, 2000), I prioritise Europeanisation over other terms.

Europeanisation is a contentious concept (see Olsen, 2002), and different authors have utilised varying definitions to explain the phenomenon. The concept has been described as the European Community's (EC) influence on the policy-making processes and organisational logic of member states (Ladrech, 1994), the growing impact of the EU on domestic policy domains (Borzel, 1999, p.574) and adaptation to European integration processes at the domestic level (Vink and Graziano, 2008, p.7). Radaelli (2000, p.4) has offered a broader explanation by accentuating the 'construction, diffusion and institutionalisation of formal and informal rules' at the EU level and then their incorporation at the domestic level. This definition encapsulates several previously overlooked points, such as changes in individuals' belief systems and the

role of informal procedures in generating change (Radaelli, 2000, p.4). The way Europeanisation is defined has theoretical and empirical significance. It informs us about the direction of change, the concept's independent and dependent variables and how it is operationalised. For instance, the above interpretations and definitions agree on the EU's impact on member countries. However, some of them strive to combine both member states' efforts to formulate common EU policies and those policies' subsequent effects on member states (Baun and Marek, 2013; Major, 2005; Radaelli, 2000, p.4; Risse, Cowles and Caporaso, 2001, p.3; Vink and Graziano, 2008, p.7). This approach usually comes at the cost of analytical clarity, as it blurs the lines between the dependent and independent variables (see Section 2.2).

In this study, I define Europeanisation of foreign policy as changes in the substance of member states' national policies due to their participation in the EU. This definition prioritises parsimony over comprehensiveness and helps overcome analytical and research design issues when operationalising the concept. The definition serves three purposes. First, it explicitly stresses the EU's role and excludes other potential factors that may generate change at the national level. Thus, it differs from comprehensive conceptualisations such as Major's (2005, p.186) broader emphasis on Europe (as opposed to the EU). Therefore, unless changes in member states' national policies can be associated with the EU's role, they do not count as evidence of Europeanisation. Second, underlining the participation in the EU enables us to define the Union's role as a policy-making structure and a forum for member countries. The former denotes vertical Europeanisation, where changes in foreign policy take place after policies are adopted at the EU level. The latter indicates horizontal Europeanisation where the

EU sets the scene (Major and Pomorska, 2005, p.1) for exchanges between member states' national policies (Bache and Jordan, 2006, p.22). Third, emphasising change means that participation in the EU must result in changes to member states' national foreign policies in order to qualify as Europeanisation. Relatedly, the exclusion of institutional and normative aspects from the definition means that this definition specifically problematises change in policy substance. Thus, even if member states do not follow the EU's traditionally accepted codes of conduct in foreign policy (i.e., coordination reflex, consensus building, esprit de corps, socialisation of national diplomats) but change their policy positions as a result of other strategies, such as hard bargaining, their foreign policies are regarded as Europeanised.

It is also essential to clarify what Europeanisation does not mean and differentiate it from other similar concepts. First, Europeanisation is not European integration. The latter investigates why member states delegate sovereignty to supranational institutions and how it affects state sovereignty (Graziano and Vink, 2013, p.38). In contrast, Europeanisation research is generally interested in how integration processes at the EU level lead to changes at the domestic level (Radaelli, 2012, p.1). Second, Europeanisation is different from the convergence of member states' national policies. While some authors have argued that increased institutionalisation at the EU level may gradually bring member states' policies closer to each other (Wong and Hill, 2011, p.8), Europeanisation may also generate differences among member states due to divergent national preferences and conditions (Olsen, 2002, p.934; Radaelli, 2000, p.6). Third, the concept should not be equated with harmonisation. Although the EU directives aim to harmonise national policies in some areas (e.g., equal pay, working time), member states still have leeway to adapt them to national conditions (Graziano and

Vink, 2013, p.38). This is particularly true in the area of foreign policy, which is dominated by intergovernmental decision-making and where the EU does not possess direct implementation powers.

2.2. Europeanisation of foreign policy

2.2.1. Intergovernmentalism and the case for Europeanisation

Before examining the Europeanisation of foreign policy, it is important to specify what the EU foreign policy entails. The conduct of the EU's foreign policy is not strictly limited to the CFSP, as the Union's activity in foreign policy is often accompanied by areas such as trade, enlargement, sanctions and humanitarian aid (Blockmans, 2018; Broberg, 2018; Canamares, 2018; Eckes, 2018; Ott and Van der Loo, 2018). In this sense, while EU foreign policy-making is mainly dominated by unanimity and intergovernmentalism, there is still room for the 'Community method' with the involvement of the Commission, the European Parliament (EP), the Council of the EU, the ECJ and the potential for the qualified majority voting (QMV) in the Council (Keukeleire and Delreux, 2014, pp.14-17). As a result, different policy issues in the EU's foreign policy may be driven by different governance methods. Due to these considerations, this research takes a broad approach to the EU foreign policy and considers it as multifaceted, multi-method, and multilevel (Amadio Vicere and Sus, 2023; Keukeleire and Delreux, 2014). Taking this position helps elaborate a wide range of areas in the EU foreign policy, without which it would be impossible to illuminate the full extent of the EU's position towards external

issues (Riddervold and Rieker, 2024). It also enables comprehensive empirical analysis, as the EU foreign policy, particularly towards significant international developments, is likely to go beyond the CFSP and include various policy instruments across the levels of the Union governance.

Traditional Europeanisation studies have employed different variations of the 'goodness of fit' perspective for explaining changes at the domestic level due to the EU's influence (Borzel, 2003; Borzel and Risse, 2003; Risse, Cowles and Caporaso, 2001). The approach argues that the misfit between national and the EU levels generates strong adaptational pressures for the implementation of EU-level policies, and domestic actors' preferences either increase (conflictive approach) or decrease (cooperative approach) adaptational costs for them (Borzel, 1999, pp.591-593; see also de Flers, 2005, p.13). However, the mainly intergovernmental and consensus-based nature of foreign policy makes it distinct from other EU policy areas. Therefore, the application of traditional 'goodness of fit' perspective has been considered challenging, if not impossible, when it comes to explaining Europeanisation in foreign policy, as there are no formal EU-level pressures and enforcement mechanisms in this area (Moumoutzis, 2011, 614). While decisions in this area are still binding for member states (Wessel, 2015, p.124; Wessel and Szep, 2022, p.22), the absence of the ECJ enforcement gives them substantial room for manoeuvre to pursue their independent national policies.

Nevertheless, the largely intergovernmental nature of the EU foreign policy does not mean that Europeanisation cannot be applied to the area. Admittedly, the concept was first exercised to explain the EU's influence on national policies in the former first pillar areas where

Europeanisation takes place in a top-down fashion (Wong and Hill, 2011, p.11). Thus, using Europeanisation as a model to explain changes in member states' foreign policies may lead to a question of how the EU's impact can change their national policy positions if they are themselves in charge of the EU's common foreign policy. To complicate matters, some studies (de Flers and Muller, 2012; Hettyey, 2021; Major, 2005; Miskimmon, 2007; Wong, 2006, p.101, 2008) include uploading (national projection) among the dimensions of Europeanisation. They incorporate member states' endeavours to shape the EU's common policies within the definition of the concept. These arguments inevitably generate difficulties in identifying the cause and the outcome of the process when deploying the Europeanisation concept. However, the challenges are not insurmountable. Moumoutzis (2011, p.610) notes that the concept is useful if 'it only has *one face* – that is to say if it directs our attention to *a single set of phenomena*' (emphases in original). This study problematises the EU level's effect on member countries' national policies and brackets the EU policy-making processes to adopt a narrow approach. Hence, from this perspective, Europeanisation specifically denotes changes at the domestic level due to member states' participation in the EU. Furthermore, Europeanisation does not require advanced integration, and changes in member states' national policies through the EU's impact are not dependent on the extent of the EU integration in a policy area (Moumoutzis, 2009, p.48). As Bulmer and Radaelli (2004, p.7) posit, instead of completely excluding Europeanisation, supranational institutions' weak role means that the process happens through voluntary and non-hierarchical ways. Hence, the largely intergovernmental

character of the EU foreign policy does not constitute an obstacle to applying Europeanisation to this area.³

2.2.2. The dimensions of Europeanisation

Traditionally, scholars have applied Europeanisation to foreign policy by integrating 'state-centric' and 'Europeanist' perspectives (Wong, 2008, pp.323-324). The former has its roots in intergovernmentalism and prioritises member states' leading role as purposive and utility-maximising actors and intergovernmental bargaining in this area. In contrast, the latter is derived from neofunctionalism and emphasises the European identity and its influential role in member states' national foreign policies (Wong and Hill, 2011, p.5). Interpretations of these approaches have led to the emergence of three dimensions of Europeanisation in the literature: downloading, uploading and cross-loading (Muller, Pomorska and Tonra, 2021, pp.521-522; Tonra, 2015; Wong and Hill, 2011).

Downloading investigates how member states' foreign policies, policy practices and institutional structures are affected, changed and developed as a result of the EU policy-making processes (Tonra, 2015, p.183). The direction of change is top-down (from the EU to member states), and the influence of the EU level eventually leads to policy adaptation and change at the national level (de Flers and Muller, 2012, p.23; see also Wong and Hill, 2011, p.6

³ For instance, when bargaining situations generate the lowest common denominator outcomes (LCD), the final agreement is not always fully compatible with the least cooperative member state's preferences (Moravcsik, 1993, p.501), meaning that even decision-making processes based on consensus or unanimity can lead to changes in member states' national policy positions.

for the convergence argument). It may result in the EU's increased role in national policy-making, more association with the EU policy objectives and prioritising EU-level policies over national considerations (Wong, 2008, p.326). In contrast, uploading examines member states' attempts to project their national preferences and policy positions to the EU level. The direction of change is bottom-up (from member states to the EU), and member countries try to influence the EU's common foreign policy (Wong and Hill, 2011, p.1). They may attempt to use the EU to prevent the adoption of unfavourable policy positions, shape the CFSP agenda and other members' policies, gain greater global influence and limit the potential costs and risks of following contentious policies unilaterally (Baun and Marek, 2013, p.8; de Flers and Muller 2012, p.22; Kaminska, 2014, p.13; see also Borzel, 2002). In this sense, although larger countries have more capabilities to strengthen their positions and shape EU policies (Gross, 2009, p.xii), small and medium-sized members may also actively influence EU decisions in areas and regions where they have particular expertise (Tallberg, 2008, p.693).

In recent years, the cross-loading dimension has become popular in Europeanisation studies. According to this dimension, alongside the EU's direct influence, national policy changes also occur through horizontal interactions among member states (Major and Pomorska, 2005, p.2; see also Amadio Vicere, 2025; Delreux and Keukeleire, 2017; Lovato, 2024). As such, the EU offers a forum for policy exchanges among member states' policies and plays an indirect role in the process (Major, 2005, p.186). Member states may support and adapt to each other's similar positions regarding EU-level policy initiatives (Czulno, 2021, 2022, 2023; Muller, Pomorska and Tonra, 2021, p.522). It can also be the case that a group of member states take the lead in the EU foreign policy through ad hoc coalitions or formats, whose efforts may

generate changes in other member states' foreign policy positions (Blockmans, 2017; see also Amadio Vicere, 2023; Amadio Vicere and Sus, 2023; Siddi, Karjalainen and Jokela, 2023; Sus, 2023). Some of these formats, such as the Normandy Format and the E3 (consisting of France, Germany and the UK), may become a part of the EU's common foreign policy (Alcaro and Siddi, 2021; Lovato, 2024), while others, such as Sweden's activism in the recognition of Palestine, may be limited to the coalition of the willing or a group of like-minded countries (Aggestam and Bicchi, 2019). In this sense, it may be challenging to separate downloading and cross-loading when ad hoc coalitions or formats manage to shape the EU's common line. Thus, it is important to emphasise that the EU, through EU-level policy initiatives, functions as an independent variable in both dimensions of Europeanisation. The main difference between downloading and cross-loading is that, in downloading, a policy initiative becomes a part of the EU's common position, whereas in cross-loading, it is driven by EU member states (provided that they operate within the EU's institutional structure) without necessitating a common EU policy. In other words, in cross-loading, the EU sets the scene, and changes at the national level take place not only 'due' but also 'within' the EU (Major and Pomorska, 2005, p.1), as member states cooperate outside of the EU institutions but still as a result of their EU membership and participation in the CFSP (Muller, Pomorska and Tonra, 2021, p.522). The role of the two dimensions in Europeanisation can be identified by considering a member state's involvement in the EU policy-making processes. Namely, if a state actively participates in policy transfers and exchanges with fellow member states during the policy-making phase of an EU-level initiative, then its foreign policy is more likely to be changed through cross-loading. Conversely, if a member state does not engage with other member states during the policy-

making phase and adjusts its national policy only after an EU-level initiative has become the EU's common line, then its foreign policy is more likely to be altered through downloading.

This research examines the Europeanisation of foreign policy through downloading and cross-loading and excludes uploading. This decision is driven by two factors. First, considering uploading as part of Europeanisation engenders methodological and conceptual problems. While admittedly, there is a close connection and circularity between member states' projection of their national preferences to the EU level and policy changes at the national level (see Wong and Hill, 2011, p.11; Graziano and Vink, 2013, p.47), ascribing them to Europeanisation blurs the lines between the dependent and independent variables. It becomes unclear which level (whether national or the EU level) initiates the process and where changes happen. As Tonra (2015) notes, 'A clear differentiation between these two ideas of Europeanization is required, otherwise, we are in danger of creating studies that imply Europeanization is being caused by Europeanization.' The exclusion of uploading, however, does not mean that the EU foreign policy-making processes (driven by member states and, to a lesser extent, EU institutions) are disregarded. They are utilised to determine the final output of the EU's foreign policy in the form of policy initiatives and to examine the differences between member states' initial and later policy positions.

Second, this research's focus on crisis situations leads to a conceptualisation that combines the downloading and cross-loading dimensions. In recent years, studies analysing the EU's responses to different crises have highlighted a more coordinative form of Europeanisation (Juncos, Lovato and Pomorska, 2025; Ladi and Polverari, 2025; Ladi and Wolff, 2021). This

approach differs from coercive Europeanisation and is characterised by growing interdependence between member states and EU institutions, prompting informal coordination mechanisms to formulate swift and acceptable responses for every member state (Ladi and Polverari, 2025; Ladi and Wolff, 2021). In foreign policy, crises have been argued to produce ‘horizontal patterns of cooperation between member states and EU institutions’ that ‘transcend vertical downloading and uploading dynamics’, sometimes leading to non-western European member states’ increasing influence and more collaborative decision-making practices (Juncos, Lovato and Pomorska, 2025, pp.120-124). However, these studies have been largely driven by the broader definition of Europeanisation, focusing on the EU-level policy-making processes rather than investigating changes solely at the national level. It has also been argued that the coordinative response to a crisis and horizontal collaboration mark a shift from bargaining and the LCD outcomes (Juncos, Lovato and Pomorska, 2025, p.127). However, as admitted by Ladi and Polverari (2025, p.9), this approach overlooks instances when a crisis response may lead to disagreements within the EU. Namely, a crisis may not be perceived similarly by all member state governments, which, in turn, may affect their reactions and policy strategies towards collective responses at the EU level. Hence, coordinative Europeanisation’s bias towards a collaborative response⁴ may struggle to explain how potential disagreements are resolved and what influence or leverage the EU exerts over member states that refuse to collaborate.

⁴ For example, Ladi and Polverari (2025, p.6) note that due to crises, member states may find the EU decisions better than their own initiatives.

Therefore, while recognising the prevalence of the horizontal mechanism of cross-loading in the EU foreign policy, this research also emphasises the role of downloading in Europeanisation. It describes a crisis as a situation when an immediate reaction is warranted in the face of exogenous and unpredictable circumstances that endanger the fundamental values of a system (Riddervold, Trondal and Newsome, 2021, p.7). In this way, this research argues that increased threat perception, urgency and uncertainty (see Boin et al., 2005, cited in Riddervold, Trondal and Newsome, 2021, p.7) may put pressure on the EU as an international actor and create a situation where non-action would be unacceptable (see also Bosse, 2022; Juncos and Pomorska, 2021, p.554; Maurer, Whitman and Wright, 2023; Rieker and Riddervold, 2022, p.460). This, in turn, may generate an expectation on member states and EU institutions to devise a response to a crisis (see Falkner, 2016, p.222). Admittedly, a crisis does not result in adaptational pressures in foreign policy as in the traditional 'goodness of fit' approach, which would have legally obliged member states to reduce differences ('misfit') between the national and the EU's common policies. Thus, without necessarily producing convergence and limiting member states' independence in foreign policy, the EU may act as a transmission belt and manifest the necessity of common action against exogenous crises. It can help address potential disagreements among member states in foreign policy by offering creative solutions in the form of issue linkages and exerting pressure on deviant member states. In this sense, while powerful member states possess political and economic means to influence countries that hinder common action, their unilateral efforts without the EU's institutional structure are unlikely to induce significant change in member states resisting a unified EU response. The EU, through its multilevel governance structure, has greater leverage across a broad spectrum of foreign and non-foreign policy domains to foster

consensus. Therefore, this research advocates a simultaneous understanding of the EU's role as a forum for policy exchanges (cross-loading) and its direct influence (downloading) on member states' national foreign policies in examining Europeanisation.

2.2.3. Focusing on changes in policy substance

This research problematises the Europeanisation of foreign policy by specifically analysing changes in policy substance. It comprises both shifts in a country's overarching long-term priorities and short-term issue-specific positions (see also Baun and Marek, 2013, pp.13-14). In this sense, policy substance represents the key determinant of a country's foreign policy, which is supported by policy-making procedures and policy strategies (see Baun and Marek, 2013, p.10; Moumoutzis, 2011, p.619). However, policy-making procedures and policy strategies are examined to explore mechanisms of policy change rather than representing an outcome of Europeanisation. In this context, procedures denote policy-making practices in the EU foreign policy area. They incorporate, inter alia, coordination reflex, consensus-seeking, socialisation, consultations, information sharing, avoiding isolation, respect for the agreed-upon language, mutual loyalty among member state diplomats and bargaining (Delreux and Keukeleire, 2017; Dur and Mateo, 2010a, 2010b; Dur, Mateo and Thomas, 2010; Glarbo, 1999; Juncos and Pomorska, 2006, 2024; Mckibben, 2010; Nuttall, 1992; Smith, 2003; Tonra, 2001, 2015). For their part, policy strategies specify how member states aim to achieve their policy goals within the EU. They may see the EU as an opportunity to enhance their interests and use the CFSP institutional mechanisms to fulfil their strategic policy objectives; however, member countries may also consider the EU as a constraint for conducting their national policies and

attempt to protect their specific interests from the EU influence by opposing it (see Sections 2.4.1, 2.4.2; also Baun and Marek, 2013, p.16; Manners and Whitman, 2000). Thus, if changes in policy-making procedures and strategies do not translate into changes in policy substance, this research treats their role in Europeanisation as limited.

The focus on the substance also sets this research apart from other Europeanisation studies. Some studies on the EU foreign policy (see Baun and Marek, 2013; de Flers and Muller, 2012; Moumoutzis, 2011; Pomorska, 2015) take Radaelli's (2000) definition of Europeanisation as their starting point for examining Europeanisation. The inclusion of 'formal and informal rules, procedures, policy paradigms, styles, 'ways of doing things' and shared beliefs and norms' (Radaelli, 2000, p.4), which are mainly derived from constructivist scholarship, carries two implications. First, it stretches the concept, suggesting that Europeanisation may entail changes in policy-making procedures and strategies in addition to policy substance. In this case, too many conditions may need to be fulfilled before a country's national foreign policy can be considered fully Europeanised or changed through the EU's influence. In other words, according to this approach, member states may be required to change their national policies through traditional EU foreign policy norms and principles (see below) for a complete Europeanisation.

Second, the broader definition of Europeanisation gives rise to discussions of de-Europeanisation trends when member states do not adhere to the EU's traditional and agreed-upon norms and principles in foreign policy. Admittedly, scholars note that 'policy disagreements, reversals, weaknesses, failures, or limitations' in the EU foreign policy are not

considered de-Europeanisation and are part of the normal political contestation (Muller, Pomorska and Tonra, 2021, p.522). However, they argue that wider moves 'towards authoritarian/illiberal politics' and a 'rejection/inversion of the founding values of the EU' would be seen as evidence of de-Europeanisation (Muller, Pomorska and Tonra, 2021, p.523). In this sense, they identify 'the reconstruction of professional norms, a sustained challenge to foundational norms – both procedural and substantive leading ultimately to structural disintegration' as three possible elements of de-Europeanisation (Muller, Pomorska and Tonra, 2021, p.526; see also Smith, 2021; Thomas, 2021; Tonra, 2018). However, this approach and defining the agreed-upon norms and principles in the EU foreign policy in constructivist terms (see de Flers and Muller, 2012; Muller, Pomorska and Tonra, 2021; Tonra, 2003, 2015, 2018) may overlook instances in which member states are involved in hard bargaining to attain or defend their national policy objectives. They may deviate from the abovementioned EU foreign policy norms and principles but still accept, albeit sometimes after gaining some concessions, the inevitability of a common position due to EU-level factors. Thus, applying the constructivist and normative understanding would suggest that if member states do not abide by traditional EU codes of conduct and instead change their national foreign policies due to different tactics (such as bargaining, which is used in foreign policy more than any other policy area), they may not meet the strict definitional criteria for Europeanisation. Put differently, it would potentially exclude cases of Europeanisation where the EU's influence may generate changes in the substance of member states' foreign policies. To address this issue, this research adopts a rationalist approach and focuses on changes in policy substance. In this sense, it does not view normative and ideational elements as prerequisites for Europeanisation, and policy-making procedures and policy strategies are treated as antecedent conditions in the process.

2.3. Applying theory to Europeanisation

The dimensions of Europeanisation provide only a preliminary model and do not explain how changes in member states' national foreign policies take place. Further, Europeanisation itself is not a theory but a concept and is explicated by resorting to other theoretical perspectives (Radaelli and Exadaktylos, 2010, p.189). This means that Europeanisation is a problem or puzzle and does not provide straightforward answers to theoretical and empirical issues (Radaelli, 2004, p.5). Hence, this research draws on new institutionalism (see Aspinwall and Schneider, 2000; Bulmer, 1994; Hall and Taylor, 1996; Immergut, 1998; Pollack, 1996) and, more specifically, the RCI to elucidate the mechanisms of Europeanisation and downloading and cross-loading dimensions.

2.3.1. Two competing explanations

In foreign policy, Europeanisation research has employed both sociological (constructivist) and rationalist strands of institutionalism to illustrate the dynamics of domestic changes (Borzel and Risse, 2000; 2003; Cowles, Caporaso and Risse, 2001; Cowles and Risse, 2001; Heritier et al., 2001; Jacquot and Woll, 2003; Knill and Lehmkuhl, 1999; Knill and Lenschow, 2001). The sociological perspective has considered rationalist approaches insufficient to explain changes in national foreign policies and has instead resorted to mechanisms with their roots in constructivism to elucidate Europeanisation (Tonra, 2003). In this strand, the nature of decision-making in the EU foreign policy has been characterised by procedural norms, including, inter alia, coordination reflex, consensus-seeking, consultations, information

sharing, avoiding isolation within the group and respect for the agreed-upon language (Glarbo, 1999; Juncos and Pomorska, 2006; 2024; Nuttall, 1992; Smith, 2003, pp.38-57; Tonra, 2001, 2015). Constructivist approaches have presented socialisation and learning as the main drivers of change in member states' national policies (de Flers and Muller, 2012; Gross, 2009; Kaminska, 2014; Major, 2005; Pomorska, 2011, 2015; Tonra, 2003). They have examined belief systems, ideas, roles and identities to determine the extent of the EU's impact on national foreign policies (Major, 2005, p.186; Pomorska, 2015; Tonra, 2003). It has been argued that the EU foreign policy cooperation may lead to domestic changes in the form of elite socialisation, bureaucratic reorganisation, constitutional change and changes in the public support for the EU-level cooperation and exchange of ideas, norms and ways of doing things (Major, 2005; Smith, 2000, p.617; see also Baun and Marek, 2013, pp.7-17). Some rationalist accounts have also incorporated socialisation and learning within their frameworks by emphasising the strategic nature of the process. As such, they have argued that member states do not transform their overarching policy goals due to socialisation per se; instead, they strategically employ socialisation to increase their social status and calculate the long-term benefits of institutional cooperation (Czulno, 2021, 2022, 2022; Juncos and Pomorska, 2006, p.4). By doing this, they can utilise socialisation and experiential learning for policy transfers within the EU to secure the support of other members in realising their strategically crucial policy objectives in the future (Czulno, 2021, 2022). In this way, these studies have included an inherently constructivist element of socialisation (see Checkel, 2005) and learning in their approaches and combined the strengths of rationalist and constructivist positions.

Nevertheless, with their emphasis on normative and ideational factors, constructivist perspectives struggle when member states resort to traditional bargaining in EU foreign policy-making. Although they do not argue that there has been a shift in member states' role conceptions towards supranationalism (see Beyers, 2005; Juncos and Pomorska, 2006, p.3), mechanisms derived from constructivism, such as socialisation and thick or social learning (see de Flers and Muller, 2012, p.28; Moumoutzis and Zartaloudis, 2016, p.344), imply that member states may align with EU-level policies due to non-strategic reasons. This approach overlooks what is arguably the defining feature of EU foreign policy: its foundation in the member states' national interests and heavy reliance on intergovernmentalism. While relatively less important and day-to-day policy-making processes in the EU foreign policy may be explained by constructivist accounts, their application becomes more difficult when important common foreign policy decisions with considerable implications on member states' national policies are examined. These instances represent a significant setback for the explanatory power of the constructivist approaches, as their emphasis on normative and ideational elements may not fare well in explicating bargaining situations. Thus, this research argues that a strictly rationalist interpretation of Europeanisation more comprehensively captures the concept in foreign policy, allowing us to better specify member states' strategies and mechanisms of change.

2.3.2. Rationalist understanding of Europeanisation

Rationalism is understood as focusing on states' preferences in pursuing their goals rather than on the outcomes of their preferences (de Mesquita, 1981, p.31; Lake and Powell, 1999, p.7; Mearsheimer and Rosato, 2023, p.x, 66-67; Rathbun, 2019, p.37; see also Glaser, 2010, p.3).

In this study, states are considered instrumentally rational and expected utility maximisers. They are self-interested actors and behave in accordance with their preferences (Shepsle, 2010, p.15). As Glaser (2010, p.2) notes, a rational state 'makes purposive decisions that take reasonable account of its interests, and the international constraints and opportunities that it faces'. Rathbun (2019, pp.26-27) identifies goals and constraints as the two key elements of instrumental rationality, adding, 'Instrumental rationality takes into account what we want but also what we need and makes choices between the two. The probability of different outcomes – that is, their feasibility – are part of any expected utility calculation'. It is assumed that states calculate the expected utility function of all available outcomes and rank them in a transitive relation to each other (Green and Shapiro, 1994, p.14). As such, rational states choose the action that is more likely to lead to their most desired outcome (i.e., maximise their expected utility) (de Mesquita, 1981, p.31; Mearsheimer and Rosato, 2023, p.73; Morrow, 1994, p.17; Shepsle, 2010, p.33).⁵

This research argues that EU member states are driven by self-interested and self-regarding action (see Rathbun, 2019, pp.40-42), and their EU membership has not transformed their identity into a supranational one. This means that member state governments usually prioritise their national foreign and security interests in EU decision-making. While compromises are still possible, they are more likely to be in areas where member state

⁵ Transitivity is one of the two essential attributes of rationality along with completeness. According to this principle, an actor's preferences over outcomes are transitive, which means that an actor assigns a value or utility to all available alternatives. That is, if A is ranked over B, and B is ranked over C, then A is ranked over C. In this case, an actor is considered rational if his or her choices are compatible with preferences (in this case, if A is selected, as it is at the top of the actor's preferences) (Shepsle, 2010, pp.20-29). For its part, the completeness principle of rational choice requires an actor to have a complete preference ordering of all available alternatives, which then can be compared to make decisions (Morrow, 1994, p.18, 352).

preferences and EU-level initiatives overlap or in instances when member states' vital objectives are not significantly affected. The adaptation of the rational choice approach to new institutionalism means that actors' preferences combine with institutional features to affect social outcomes (Shepsle, 1989, p.135). In this context, actors' preferences are exogenous to examining institutions, and institutions organise actors' strategic behaviour by supplying them with agenda-setting and enforcement mechanisms to reduce uncertainty and attain better outcomes (Hall and Taylor, 1996, p.939, 945). According to the principle of strategic behaviour, states have a fixed set of preferences, engage in instrumental action and act strategically to achieve their objectives (Hall and Taylor, 1996, p.945). From the rational choice perspective, the EU's institutional framework guides member states through uncertainty by providing them with additional information, resources and constraints (Juncos, 2005, p.10; see also Hofelich, 2022; Howarth and Verdun, 2020). This strand identifies two types of institutions: structured and unstructured. The former denotes the exogenous and more formal role of institutions whereby they act as scripts and constrain the actors' behaviour (Shepsle, 2006, pp.24-27). In this context, the EU's constraining role is unlikely to change self-interested actors' fundamental objectives, which are driven by the logic of consequences (Jupille and Caporaso, 1999, p.432; March and Olsen, 1998, pp.949-951). At the same time, actors are not merely 'human computers' (Lake and Powell, 1999, p.7); they respond to new information and are inclined to alter their decisions in the light of the newly acquired knowledge (Mearsheimer and Rosato, 2023, p.21). For their part, unstructured institutions are endogenous where actors define the rules of the game and identify informal and implicit patterns of behaviour (Shepsle, 2006, pp.24-28). Thus, the EU functions as a structured and unstructured institution, as foreign

policy-making is characterised by both explicit and implicit rules, norms and principles (Tonra, 2003, p.733).

2.3.3. High politics and government priorities

Adopting a rationalist approach in this study yields two key implications. First, I argue that the rationalist logic (the logic of consequences) is more prevalent in agreeing on highly critical policy decisions. By advancing this position, I do not assert that constructivist perspectives are ill-suited to explain EU foreign policy-making and Europeanisation in this area. In fact, the EU foreign policy cooperation emerged as an informal coordination process outside of the EU's Treaty framework with the establishment of the European Political Cooperation (EPC) in 1970, and member states have adhered to established formal and informal practices in the EU's foreign policy even after the institutionalisation of the CFSP (Glarbo, 1999; Juncos, 2015; Juncos and Pomorska, 2006, 2024, pp.4-5; Nuttall, 1992; Smith, 2003). Studies have shown the role of constructivist explanations on various levels of EU foreign policy-making (Howorth, 2010; Juncos and Pomorska, 2006; Juncos and Reynolds, 2007; Lewis, 2005; see also Howorth, 2012), with some of them emphasising the role of both rationalist and constructivist logics in shaping the EU decision-making in foreign policy (Howorth, 2012; Lewis, 2005; Youngs, 2004). However, the EU's growing role in foreign policy and geopolitical developments necessitating its response in recent years, combined with member states' increasing obstruction of common decisions (Thomas, 2021; see also Biedenkopf, Costa and Gora, 2021; Juncos and Pomorska, 2021; Maurer and Wright, 2021), has challenged constructivist explanations. Therefore, employing a domain of application approach helps interpret the relationship and division of

labour between the rationalist and constructivist perspectives and their explanatory grounds. It specifies their respective 'home domains' and conditions under which they are more likely to be applicable (Jupille, Caporaso and Checkel, 2003, pp.21-22; see also March and Olsen, 1998, p.953).

The domain of application approach is predicated on the distinction between governments' strategic policy objectives and peripheral interests (Rathbun, 2019, p.48). Member state governments are more likely to act in a self-interested manner and defend their strategic policy objectives when their crucial interests are at stake (Hoffmann, 1966; McKibben, 2010, pp.698-700). Conversely, they may be more inclined to make compromises when their strategic policy objectives are not significantly affected (Lipson, 1984; Mearsheimer, 1994/95; Wagner, 2003).⁶ This means that even though procedural norms, such as coordination reflex, consensus-seeking, consultations, information-sharing, avoiding isolation and respect for the agreed-upon language, may dominate EU foreign policy-making (Glarbo, 1999; Juncos and Pomorska, 2006, 2024; Muller, Pomorska and Tonra, 2021; Nuttall, 1992; Smith, 2003, pp.38-57; Tonra, 2001, 2015), member state governments are ready to go to great lengths to defend their strategic objectives, sometimes at the cost of established procedural norms. Put differently, when governments face a dilemma of defending their strategic policy objectives or following

⁶ This argument is rooted in relative and absolute gains debate in International Relations (Lipson, 1984; Mearsheimer, 1994/95). Lipson (1984, p.12; see also Mearsheimer, 1994/95, pp.18-20; Wagner, 2003, p.579) differentiates between institutional arrangements related to economic issues and security regimes. He notes that the two areas share different types of strategic interaction. Thus, economic issues are more coordinative and more likely to involve reciprocal gains, whereas security issues are more likely to be conflictual and fragile (Lipson, 1984, p.12). I put a government's interpretation of a country's national policy priorities at the centre of my approach. It allows me to factor in a state's agency in the decision-making process rather than solely focusing on the policy issue itself.

the EU's procedural norms, strategic considerations and the logic of consequences take precedence over the logic of appropriateness (see also Mearsheimer, 2025, p.25).

In this study, states' strategic policy objectives are understood to be driven by a government in power and constitute the critical, fundamental and first-order policy priorities that the government is unwilling to compromise. They can be identified through the government's national foreign and security strategies, government programmes, repeated statements by high-level representatives and diplomats and consistent patterns of behaviour regarding policies and positions potentially affecting the stated strategic objectives during international negotiations. Rather than treating strategic policy objectives as fixed, this study allows for their gradual adjustment or reprioritisation in response to evolving domestic and international developments, which can be observed through changes in official strategy documents, shifts in governmental rhetoric, altered negotiating positions during international negotiations and variations in policy positions across successive policies. At the EU level, a strategic policy objective can be inferred when a government consistently advances similar preferences across multiple EU policy initiatives.

The second implication of adopting the rationalist approach is that this research views states as primary actors in international relations and holds that they create institutions to derive benefit from cooperation (Hall and Taylor, 1996, p.945). Hix and Goetz (2000, p.20) note that the EU's impact on member countries depends on national actors and institutions, and they play a decisive intervening role in transmitting the Union's influence to member states. The statement is even more true for foreign policy due to its largely intergovernmental character

and limited direct EU influence on member countries' national policies. Hence, I introduce a government's interpretation of a country's strategic policy objectives as an intervening variable to investigate Europeanisation in this domain. While the 'goodness of fit' perspective operates when there are EU-level adaptational pressures, this intervening variable acknowledges the primary role of member states in the EU foreign policy and assigns them the ultimate authority in deciding their national policy positions. As such, I argue that as long as an EU-level policy initiative does not affect a government's strategic policy objectives, a country is more likely to take a cooperative strategy and be open to changing its national foreign policy. Conversely, when an EU-level policy initiative negatively affects a government's strategic policy objectives, a country is more likely to adopt a conditional dissent strategy and bargaining tactics and initially oppose changing its national foreign policy. However, conditional dissent does not mean the absence of Europeanisation, and a member state government may still align its national policies with the EU-level initiative after securing a favourable agreement. In sum, these perspectives offer two different pathways for explaining Europeanisation with potentially varying degrees of change in member states' national policies.

2.3.4. Rationalist interpretation of the Europeanisation dimensions

The rationalist explanation of downloading considers member states as self-interested and purposive actors who are more likely to subscribe to EU-level initiatives concomitant with their strategic policy objectives. Thus, it is a straightforward decision for member countries to support common EU policies that reflect their national interests. Rational choice explanations

are particularly suitable for critical policy decisions when member state governments' strategic policy objectives are at stake. As such, when an EU-level initiative does not align with their strategic policy objectives, member countries can strategically use the CFSP institutional mechanisms and their veto power to demand concessions and exemptions from common decisions (see Borzel, 2002, p.205, who defines it as foot-dragging). These strategies are likely to produce bargaining tactics at the EU level. In this way, member states can accommodate at least some of their strategic objectives within common EU policies before their adoption. The predominantly intergovernmental nature of the EU foreign policy offers ample opportunity for member states to exploit bargaining to achieve their policy objectives (Thomas, 2021). Thus, in the downloading dimension, member states' strategic behaviour consists of their efforts to adapt to EU-level initiatives that reflect their strategic policy objectives. Simultaneously, member states' intransigent position regarding critical EU foreign policy decisions may stall agreement and increase pressure on them to revise their stance. While there are no direct implementation pressures in the EU foreign policy, fellow member states and particularly EU institutions may still exert influence on member states who block a potential EU-wide consensus by utilising political and economic instruments at their disposal in foreign and non-foreign policy areas. In this context, although consensus-building remains the first resort to settle differences, extreme measures, such as withdrawing the EU funds and the Article 7 procedure, may also be considered when other options to unblock a common EU position are exhausted. To summarise, Europeanisation through downloading can happen both when an EU-level policy initiative does not challenge a member state government's strategic policy objectives (cooperative strategy) and when it does not align with the government's strategic policy objectives (conditional dissent strategy) (see sections 2.4.1 and 2.4.2 and Table 1).

The cross-loading dimension is more voluntary, and the impetus for policy change comes from member states. The institutional dynamics of the CFSP allow member countries to engage in informal and horizontal practices in the form of policy exchanges to pursue their objectives. In this way, lead groups or groups of like-minded countries can utilise coalition-building and consensus-building to reconcile their divergent interests through mutual concessions, thereby increasing their chances of achieving policy goals at the EU level (Aggestam and Bicchi, 2019, p.518; Czulno, 2021, p.1255). From the rational choice perspective, a state is more likely to change its national policies and subscribe to EU-level initiatives proposed by fellow member countries when these do not affect its government's strategic policy objectives. In this sense, a straightforward choice for a government is to collaborate on policies that align with its strategic policy objectives. Further, a government may aim to contribute to initiatives and reduce the incompatibility between national policy and fellow member states' policy positions, given that they may potentially shape and dominate the EU's common line (Baun and Marek, 2013; de Flers and Muller, 2012; Kaminska, 2014; see also Borzel, 2002). However, even when a member state government agrees to change its foreign policy positions to strategically accommodate other states' preferences, cooperation is likely to falter if its strategic policy objectives are affected (see Czulno, 2023). Because of its inherently cooperative nature, Europeanisation through cross-loading is likely to occur when an EU-level policy initiative does not affect a government's strategic policy objectives and when the government adopts a cooperative strategy (see section 2.4.1 and Table 1).

2.4. Europeanisation mechanisms and outcomes

The mechanisms of Europeanisation put forward in this research are based on and reflect rationalist principles, as strategic behaviour is considered the main driver of changes in member states' national foreign policies. These mechanisms capture how a member state government's national foreign policy is changed by the impact of EU-level initiatives. This research argues that EU member state governments adopt two different strategies depending on how EU-level foreign policy initiatives affect their strategic policy objectives. For governments, these strategies represent overarching ways of pursuing and safeguarding their strategic objectives in foreign policy. In this sense, member states are more likely to employ a cooperative strategy towards EU-level foreign policy initiatives when a government's strategic policy objectives and high policy priorities are not affected by them. In contrast, they are more likely to resort to a conditional dissent strategy when a government's strategic policy objectives are at odds with and expected to be negatively influenced by EU-level policy initiatives. In this context, tactics refer to the concrete actions through which these strategies are implemented, whereas mechanisms denote the causal processes through which EU-level initiatives exert influence and translate into changes in national foreign policy. These propositions have direct implications for how Europeanisation mechanisms operate and the outcomes they generate. The literature has identified several mechanisms to explain changes in member states' national foreign and security policies (Czulno, 2021, 2022; de Flers and Muller, 2012; Major, 2005; Moumoutzis and Zartaloudis, 2016). However, the relationship between member countries' strategies towards EU-level initiatives and mechanisms of change has been less clear-cut. Introducing an interest-based intervening variable helps us delineate

different mechanisms and the scope conditions under which they operate. As such, one can achieve a division of labour among mechanisms explicating policy change by employing cooperative and conditional dissent strategies towards EU-level initiatives.

2.4.1. Cooperative strategies

A member state has several options when its government's strategic policy objectives are not affected by or are in conformity with EU-level initiatives. In such cases, the government can more easily frame its national policy positions in line with the EU. In this way, by making only minimal or cosmetic changes to its policy positions, a member state may present itself as a cooperative actor, attempt to influence the direction of the agreed-upon policy and take ownership of an EU-level initiative. This complies with the rational choice perspective outlined in this study, which argues that states are rational, self-interested and purposive actors and pursue their national foreign policy interests. For this scenario, this research specifies two mechanisms to illustrate changes in member states' policy positions: strategic learning⁷ and strategic action.

Strategic learning refers to the process whereby member states adapt to a new environment, process available information and adjust their policies to achieve national foreign policy goals

⁷ In Europeanisation studies, rationalist explanations of learning have been defined as strategic (Juncos, 2005, p.11), experiential (Czulno, 2021, 2022), instrumental (Moumoutzis and Zartaloudis, 2016, pp.340-341), thin (de Flers and Muller, 2012, p.28) and simple (Pomorska, 2015, p.59). Despite the differences in the definitions, they all underline changes in actors' strategies without fundamental shifts in their policy objectives. Thus, to emphasise the strategic nature of learning and situate this mechanism within the rationalist concept of strategic behaviour, this study adopts the definition of strategic learning.

(Czulno, 2021, p.1250; Juncos, 2005, p.11). In this way, states aim to realise their strategic policy objectives without making any changes to them. Strategic learning at the EU level is more likely when a member state's national position is different from the EU's and fellow member states' policy positions. From the RCI perspective, the EU's institutional structure provides member states with necessary information (Hall and Taylor, 1996, p.945). For their part, member countries are responsive to new information supplied by EU-level exchanges and deliberations and can revise their behaviour by strategically aligning with EU-level positions and practices to fulfil national policy goals. Compared with social or thick learning⁸, strategic learning does not change member states' long-term goals and national interests (Moumoutzis and Zartaloudis, 2016, p.341). de Flers and Muller (2012, pp.28-29) propose three types of policy learning in the CFSP setting: organisational, lesson drawing/policy transfer and policy learning. Because of this study's focus on changes in policy substance, strategic learning incorporates policy transfers and policy learning. Learning at the individual level is relevant to this research insofar as it contributes to changes in national foreign policies. Strategic learning is used as an umbrella term throughout to avoid potential definitional confusion. In the downloading dimension, EU-level initiatives and deliberations may generate policies enabling member states to better achieve their strategic policy objectives. Without changing their overarching goals, member countries can strategically learn from EU practices and adapt their national policies to achieve favourable outcomes in areas of interest. In the cross-loading dimension, the EU provides an institutional context for member states to learn

⁸ Some studies (de Flers and Muller, 2012; Moumoutzis and Zartaloudis, 2016) employ rationalist and sociological understanding of learning simultaneously. For other conceptualisations of learning, see Hall (1993), Levy (1994), Sabatier (1987); for an extensive review of the literature and the relationship between learning and policy change, see Bennett and Howlett (1992).

from each other's policy positions. Member countries may voluntarily analyse other states' practices and strategically learn from their successful policies, which may subsequently lead to policy transfers between them (Czulno, 2021, p.1251; Dolowitz and Marsh, 1996, p.345; Wong, 2006, p.193). As such, they may enhance their prospects of fulfilling strategic policy objectives by updating and revisiting the policy instruments at their disposal.

Nevertheless, strategic learning explains only one aspect of policy change in member states' foreign policies when they adopt cooperative strategies. In other words, policy change does not always happen through strategic learning, and strategic learning is neither necessary nor sufficient for elucidating change in foreign policy (Levy, 1994, p.290). Hence, drawing on the rationalist notion of strategic behaviour, this study also employs strategic action as a Europeanisation mechanism (Shepsle, 2010, p.156). It shows similarities with the strategic socialisation mechanism used by other Europeanisation studies (Czulno, 2021, 2022; de Flers and Muller, 2012; Juncos and Pomorska, 2006). However, by abandoning socialisation and conceptualising the mechanism purely in rationalist terms, strategic action aims to avoid the epistemological burden of reconciling rationalist and constructivist approaches, as well as the challenges of operationalising socialisation (Beyers, 2010). In this sense, strategic action does not exclude member states' purposive use of institutional procedures for maximising their chances of strategic policy objectives.

In the simplest form of strategic action, member states may subscribe to EU-level initiatives that do not contradict their governments' broader strategic policy objectives. In this instance, EU-level initiatives largely reflect the policy preferences of member countries, making it a

straightforward choice for them to align with such initiatives. However, when strategic action involves an extended form of rationality (Shepsle, 2010, p.170), member states may consider the long-term implications of their preferences and consciously accept short-term trade-offs to achieve superior long-term strategic objectives. Elster posits that rationality 'is characterized by the capacity to relate to the future' (Elster, 1979, quoted in Rathbun, 2019, p.65). Rathbun (2019, p.65) notes regarding rational human beings:

They are capable of waiting, biding time, and taking a step back if it allows them to take two steps forward later. The very term "consequentialism" implies that we think forward to the consequences of our actions, rather than impulsively and automatically, envisioning the likely results of alternative paths of behavior.

In this context, EU member states may support less desirable policies and adjust their national positions accordingly in order to present themselves as cooperative actors. They may test the waters, gain additional information and refrain from an outright opposition to EU-level policies even though they could have utilised their veto power. Explaining extended rationality with an individual's consideration of the sequence of events and their long-term consequences before making a decision, Shepsle (2010, p.170) notes:

This leads ... to the possibility of anomalies in which, at a specific choice opportunity, one ends up choosing what would appear to an outsider as a *less-preferred* option, if taken as a myopic choice. Strategic behavior, in short, taking the full horizon of a process into account, may require individuals to make seemingly less-than-ideal choices at some points in order to secure superior outcomes at the end of the trail (emphasis in original).

Additionally, member states may make strategic concessions to other states and adapt to their less-than-optimal policy positions to achieve better outcomes in areas of critical national interest through their reciprocal support (Czulno, 2021; however, the study utilises the mechanism as strategic socialisation). To operationalise this mechanism, they should not engage in bargaining to pursue their interests. The latter constitutes the key difference

between cooperative and conditional dissent strategies which will be discussed in the following paragraphs.

2.4.2. Conditional dissent strategies

A conditional dissent strategy and bargaining are more likely when a government's strategic policy objectives are negatively affected by EU-level policy initiatives. Conditional dissent anticipates member states' opposition to changing their foreign policies but does not eliminate the potential Europeanisation when governments can accommodate at least some of their strategic objectives within an EU-level deal. Surprisingly, the literature has paid only scant attention to the mechanisms that can, in a broader sense, be associated with bargaining tactics. In fact, some studies (Muller, Pomorska and Tonra, 2021, pp.523-525; Tonra, 2018) consider extreme forms of hard bargaining and patterns of constant opposition to the EU's well-established foundational norms and culture of cooperation as de-Europeanisation. These studies are based on the idea that the EU foreign policy area and Europeanisation are normative enterprises. In other words, from their perspective, Europeanisation is not limited to changes in policy substance but also requires that member states follow the EU's traditional foreign policy codes of conduct interpreted in constructivist terms.

However, this research takes a different approach to Europeanisation and puts change in a member state government's national policies at its core. Thus, it does not subscribe to a normative view of the EU foreign policy as a starting point and argues that overlooking strategies and tactics (such as bargaining) that can produce policy change would ignore a

critical aspect of Europeanisation. Member state governments may well bargain with the EU and fellow members to achieve and defend their strategic policy objectives in the EU foreign policy, which is likely to produce different dynamics than when they adopt cooperative strategies. Therefore, the study introduces relatively under-researched mechanisms of issue linkage and hostage-taking with their roots in bargaining to explicate the concept and changes in member states' national policies.

Issue linkage mechanism is a special form of bargaining tactic of side payments and entails the concurrent discussion of two or more issues to achieve mutually beneficial outcomes for all parties to negotiations (Axelrod and Keohane, 1985, pp.239-241; Keohane and Nye, 2011; McGinnis, 1986, p.142; McKibben, 2010, p.702; Poast, 2012, pp.278-280; Tollison and Willett, 1979).⁹ The main premise of issue linkage is that negotiating parties may identify areas with 'highly skewed benefits' for each side, which can allow them to trade gains to reach an advantageous agreement for all (Tollison and Willett, 1979, p.437; see also Haas, 1990, pp.77-78). Issue linkage is used to address challenges regarding distribution, enforcement and a large number of participants in international cooperation (Fearon, 1998; Poast, 2012, pp.282-283). It requires 'some degree of compromise' from the engaged parties (McKibben, 2010, pp.700-701) and demonstrates the interested parties' initial willingness to find mutually beneficial outcomes to contentious issues. Thus, member state governments may offer concessions on an issue by making compromises to break the deadlock and find a mutually beneficial

⁹ The concept was initially employed by cooperation theorists to demonstrate that repeated Prisoners' Dilemma games may generate collaboration between the parties through linkage strategies of tit-for-tat and quid-pro-quo (McGinnis, 1986, p.142; see Keohane and Nye, 2011, p.25 for an argument that explains linkages from the perspective of military and economic power).

agreement. They can use implicit linkages to connect different issues in separate agreements, while explicit linkages can be employed to address the differences in the same agreement (Poast, 2012, p.280). The EU's complex and multilevel governance encompassing various issue areas may help member states agree on policies that would otherwise be unachievable. Issue linkages are more likely when both sides to an agreement receive concessions on the issue that they consider of 'greater relative importance' (Morrow, 1992, p.154; see also Koremenos, Lipson and Snidal, 2001, p.786; Tollison and Willett, 1979, p.427).

Member state governments may also employ hostage-taking to realise their policy preferences. It is another form of issue linkage, but the key difference between the two is that hostage-taking occurs when a member state adopts a hard bargaining tactic and holds an issue hostage as a 'threatening tactic to gain leverage' (McKibben, 2010, p.702). Thus, unlike issue linkage, which happens when a member state adopts a soft bargaining tactic, hostage-taking is accompanied by consistent veto threats and delaying tactics to block the adoption of EU-level initiatives unless a state's demands are met, which may generate lengthy negotiations to break the deadlock (Muller and Slominski, 2025, p.7; Thomas, 2011, p.21; 2021, p.631). As part of hard bargaining, a hostage-taker may initially make high demands, place a strong emphasis on national interests, commit to not changing its initial position and make public statements of firm resolve (Dur and Mateo, 2010a, p.562). In this research, hostage-taking refers to member state governments' unilateral action to take hostage a deal negotiated at the EU level in order to improve their bargaining power and secure specific concessions and exemptions from EU institutions and other member states.

Hofmann's definition (2019, pp.888-889) describes hostage-taking as governments' usage of their membership of one international organisation to take hostage the other institution of which they are not a member. It has also recently been applied to demonstrate bargaining dynamics within the EU's institutional structure (Muller and Slominski, 2024, 2025). Muller and Slominski (2025, pp.2-3) differentiate hard and soft hostage-taking and define soft hostage-taking as a situation where a member state attempts to gain substantive concessions from the EU but is also attentive to political and reputational costs. They argue that member states are aware of the costs of violating informal and cooperative CFSP norms and principles, and therefore avoid explicitly linking unrelated issues by discursively diverting attention from their true intentions (Muller and Slominski, 2025, p.6).

However, this research does not distinguish between hard and soft forms of hostage-taking and associates its presence with a state's hard bargaining tactic to achieve its strategic policy objectives. The fact that a member state forcibly takes an EU-level policy initiative hostage is in itself a demonstration of the neglect of the CFSP's procedural norms and principles, which generates hard bargaining situations (see McKibben, 2010, p.702). This reflects the main difference between issue linkage and hostage-taking. While the former starts with a cooperative attitude of the engaged parties, the latter involves a hostage-taker's contentious stance, even though issues become interconnected in the later phases of negotiations. Although hostage-taking contradicts the established procedural norms and principles in EU foreign policy-making (de Flers and Muller, 2012; Muller, Pomorska and Tonra, 2021; Thomas, 2011, p.15; Tonra, 2003, 2015, 2018), the unanimity principle grants member states considerable leeway to engage in hard bargaining during the EU-level negotiations. As such,

governments may be unwilling to change their national policies and thus resist EU-level initiatives unless their demands are met.

I identify two forms of hostage-taking. First, governments may want to address the controversial aspects of the EU's common policy for their strategic policy preferences. They may stall the agreement until their interests are reflected in the proposed EU initiative through specific provisions such as concessions and exemptions. Second, governments may also take hostage an EU-level initiative and connect their vote for the existing initiative to the EU's support in non-foreign policy areas (see also Haas, 1980, pp.371-372; Poast, 2012, p.381). In this way, they can attempt to unilaterally link different issues, without reciprocal engagement from the EU and other member states. Thus, the first form of hostage-taking is driven by member state governments' endeavours to protect their key strategic policy objectives. In contrast, the second type indicates member state governments' usage of their veto power to pressure the EU and attain national objectives in non-foreign policy areas. Thus, in addition to using veto power when their strategic objectives are affected, member states may also link their support for EU-level initiatives to other critical policy goals. As Tocci (2020) notes, these instances represent 'mixing apples and oranges', and 'horse-trading' is aimed at exploiting the unanimity principle through 'strategic stalling' to explicitly protect national foreign policy interests rather than advocate a common European strategy. In both instances of hostage-taking, a member state government demonstrates power and determination to protect its policy objectives and strengthen its position in negotiations through a bargaining tactic, while still leaving the door open for compromise if its demands are met.

Several factors contribute to the effectiveness of hostage-taking. The literature has specified the credibility of the veto threat, the compliance costs for the target of hostage-taking and the target's ability to change relative costs regarding the veto threat (Muller and Slominski, 2025, pp.7-9). This study identifies four conditions that influence the success of hostage-taking strategies: the relative power of a member state pushing for concessions, the nature of consensus at the EU level, the saliency of the issue for the EU's foreign policy and the nature of a state's interests at stake. While there may be a certain degree of overlap with the existing literature, these conditions put forward a comparatively different view regarding hostage-taking situations.

First, the governments of politically and economically powerful member states are more likely to successfully execute hostage-taking than those of relatively weaker members. Their relative power provides them with greater leverage to extract concessions from the EU and other member states than relatively weaker member states, who are likely to encounter insurmountable challenges to attain their strategic objectives (see Dur and Mateo, 2010a, p.564; Moravcsik, 1993, p.499; Tallberg, 2008, p.703). This may help powerful member states withstand and prevent potential EU-level pressures and achieve much of their desired policy objectives. Despite the largely unanimous nature of the EU foreign policy decision-making, relative power is still an important factor, and negotiations are not strictly among equal parties with the same power potential (see Tallberg, 2008; also Interview 7). Second, it is relatively easier for a member state to take hostage an EU-level deal and realise its objectives when several other member states also have reservations about the proposed deal. This is likely to reduce EU-level pressures on a hostage-taker and prevent its isolation, which would increase

a member state's likelihood of attaining its policy objectives. In contrast, when a member state unilaterally employs hostage-taking, its position is more likely to attract criticism and pressures from the EU and other member states, making successful bargaining comparatively difficult despite its veto power.

Third, the importance of an issue for the EU foreign policy affects the effectiveness of hostage-taking. Although the literature has discussed the relation between issue characteristics and bargaining from various angles (Haas, 1990; Hoffmann, 1966; Hug and König, 2002; Lipson, 1984; Mearsheimer, 1994/95; see also McKibben, 2010), there has been little attention to the issue salience at the EU level, and more specifically, to issue salience for the EU's common foreign policy. This study argues that the urgency of a situation necessitating some form of EU response can both improve and limit the effectiveness of hostage-taking. Namely, the EU and other member states may offer some concessions to a hostage-taker when they are under time pressure to reach a common agreement, as a potential veto can undermine the EU's common position. Simultaneously, a hostage-taker may also face significant EU-level pressures, such as the threat of suspension of its voting rights in the Council, to unblock a common agreement if it maintains its intransigent stance and has exhausted its bargaining position after gaining concessions.

Fourth, hostage-taking is more likely to succeed when a hostage-taker can demonstrate that its legitimate foreign policy objectives are to be affected by the potential agreement. As is noted (Juncos and Pomorska, 2021, p.374; see also Lewis, 2005, pp.958-965), veto threats are acceptable in the CFSP when member states' strategic policy objectives are likely to be

undermined. The EU and other member states are more likely to accommodate a hostage-taker's demands when the hostage-taker can make a convincing case about the potential impact on its genuine foreign policy objectives, rather than when it attempts to exploit unanimity and gain concessions in non-foreign policy areas. Therefore, they are wary of setting a precedent by allowing the exploitation of the unanimity principle in future rounds of negotiations, even though breaking the deadlock and finding a common deal remains in their best interests. Thus, a member state is likely to encounter considerable EU-level pressures when it abuses its veto power to extract concessions from the EU. These four factors are not necessarily mutually exclusive and are more likely to operate simultaneously and influence bargaining tactics through hostage-taking.

2.4.3. Competing Europeanisation mechanisms

The literature has also stipulated other mechanisms that can generate Europeanisation. It has been argued that socialisation (Czulno, 2021, 2022; de Flers and Muller, 2012; Juncos and Pomorska, 2006; Major, 2005; Tonra), coercion (Ladi, 2005, p.5; Schmidt, 2002, p.897), peer pressure (Hodson, 2004, p.239; Moumoutzis and Zartaloudis, 2016, p.342) and naming and shaming (Moumoutzis and Zartaloudis, 2016, p.341; Trubek and Trubek, 2005, p.357) may change member states' national policies as a result of the EU influence. However, this study does not include them among the Europeanisation mechanisms as they are either largely incompatible with the rationalist perspective adopted in this study or not applicable to foreign policy (in the case of coercion).

Europeanisation scholars have distinguished between the two types of socialisation. The first form, strategic socialisation, has been described as actors' strategic use of and adaptation to procedural norms and rules in EU foreign policy-making to achieve their strategic objectives, where these norms and rules do not become part of their identity (Czulno, 2021, p.1251; de Flers and Muller, 2012, p.25; Juncos and Pomorska, 2006, p.3). The second form of socialisation has been argued to lead to actors' internalisation of the EU foreign policy norms and principles, which may also shift their allegiances from the national to the EU level (de Flers and Muller, 2012, p.26; Juncos and Pomorska, 2006, p.3; see also Beyers, 2005; Checkel, 2005). Some scholars (Schimmelfennig, 2005, pp.830-831) have included the concept within the rationalist and consequentialist logic without ruling out that it can lead to the internalisation of norms in the future, while others (Checkel, 2005, p.809) have argued that there should be a shift from the logic of consequences to the logic of appropriateness for socialisation to happen. There are several issues with varying definitions and operationalisations of socialisation. First, the approaches that define the concept through the logic of appropriateness may imply a change in actors' role conceptions toward supranationalism, which contradicts this research's view of states as self-interested and rational actors. Second, it is not always clear whether 'social processes that do not result in internalization can be characterized as socialization processes' (Beyers, 2010, p.914; see also Thies, 2003, pp.547-548). Put differently, socialisation defined by the logic of consequences may well represent another form of strategic behaviour. Third, it is uncertain whether individual socialisation produces socialisation in state behaviour (Thies, 2003, p.547; Zurn and Checkel, 2005, p.1054). Even a rationalist interpretation of the concept may struggle to explain potential differences between member state diplomats favouring a strategic use of the EU norms and principles and government officials dictating a different

strategy to defend strategic policy objectives. If there is an incompatibility between the two, a government's position is more likely to take precedence over individual diplomats. The combination of these factors complicates the application of socialisation as a mechanism from the RCI perspective, thereby rendering it unsuitable for this research.

Regarding coercion, it is described as a 'mechanism whereby European institutions enforce change onto member states' (Leontitsis and Ladi, 2018, p.772). As Schmidt (2002, p.897) posits, a member state is required to follow the EU rules for implementing decisions at the national level when the coercion mechanism is in play. However, the absence of the ECJ enforcement in the CFSP means that the EU cannot formally pressure member states to change their national policies compared to areas where they have little room for manoeuvre in implementing EU decisions (see Carstensen and Schmidt, 2020; Ioannidis, 2014; Radaelli, 2003, p.42; Schmidt, 2002, p.897). While the EU's multilevel governance enables it to exercise influence even in foreign policy, extreme measures, such as suspending a country's voting rights in the EU Council and withdrawing the EU funds, are more likely to be deployed in rare instances when all options to find common ground are exhausted. Thus, coercion is not in itself a mechanism of change in foreign policy and may be activated as a last resort in response to hostage-taking.

Concerning peer or social pressure, Olson (1971) uses the term to explain how individuals in groups can address collective action problems. As he (Olson, 1971, p.61) argues, particularly in small and tight-knit groups, 'social sanctions and social rewards ... may be used to mobilize a latent group'. In these instances, individuals may prioritise 'prestige, respect, friendship, and

other social and psychological objectives' to realise common group goals over rational and self-interested objectives (Olson, 1971, p.60). However, while social pressure is employed to illustrate rational group behaviour, its emphasis on social factors in individuals' actions makes it more compatible with the constructivist position (Moumoutzis and Zartaloudis, 2016, p.341). Further, studying non-rational behaviour and groupthink, Janis notes that 'subtle pressures when individuals come together in cohesive groups' produce collectively non-rational behaviour (quoted in Mearsheimer and Rosato, 2023, p.175). Thus, peer pressure is incongruous with this study's rationalist orientation.

Lastly, naming and shaming posits that member states comply with the EU's common decisions because of the potential impact of negative criticism and publicity (Trubek and Trubek, 2005, p.15). Some authors (Moumoutzis and Zartaloudis, 2016, pp.341-342) assert that a government's cost-benefit calculation prioritises avoiding an electoral defeat due to the publicity of naming and shaming, which may lead to reputational losses followed by voters' punishment of the government's underperformance. Others (Schimmelfennig, 2001, pp.64-65) indicate that the mechanism operates when members upholding community norms succumb to self-interested behaviour, who, as a result of shaming, adjust their behaviour and reconcile with their sense of integrity. However, the naming and shaming mechanism involves inherently a social element. As Johnston (2001, pp.501-502) notes, 'There must be an intersubjective normative consensus about what "good" behaviour looks like', without which there will be no shaming. Therefore, he adds that social influence 'could be considered a secondary socialization process because it requires at least some prior change to an actor's understanding of the group's normative preferences' (Johnston, 2001, p.502). In the same

vein, Shimmelfennig (2001, p.65) underlines, 'Rhetorical action would not be effective if the actors were not concerned with their credibility and legitimacy as community members'. As this study argues that member state governments may defend their strategic policy objectives even at the expense of established norms, it can be expected that naming and shaming is disregarded in the process. In fact, governments may use naming and shaming to enhance their domestic and international legitimacy with minimal costs through reverse-rhetorical entrapment (Hafner-Burton, 2008, p.710; Katzenstein, 2013), which can even increase their popularity among core voters and contribute to their electoral success. Therefore, the combination of these factors makes naming and shaming incompatible with this study's rationalist theoretical foundation.

2.4.4. Europeanisation outcomes

The literature has explored the EU's differential impact on member states' national policies (Exadaktylos and Radaelli, 2015, p.209; Henokl, 2022; Heritier et al., 2001; Howorth, 2019) and has specified varying Europeanisation outcomes based on the extent of changes at the national level (Borzel and Risse, 2003, pp.69-70; Heritier, 2001, p.54; Radaelli, 2003, p.37; Schmidt, 2002, p.901). While some studies (Wong and Hill, 2011, p.4) expect Europeanisation to generate convergence in the CFSP area, the argument is difficult to sustain. Namely, if Europeanisation fails to pass an easy test in the former first pillar policy areas in producing identical outcomes, it becomes even more challenging to anticipate convergence in the intergovernmental CFSP area. Further, convergence is notably tougher in policy substance than in policy-making procedures and strategies, as member states may be disinclined to alter their

national foreign policies. Admittedly, member countries may agree on common EU policy positions directed towards a country, region or issue area. However, their agreement is unlikely to translate into the same Europeanisation outcome (or, in fact, Europeanisation), considering the absence of the ECJ enforcement in this area and member states' different national policy preferences. As Tocci (2020) points out, 'In too many cases, no sooner the ink is dry on those carefully crafted texts than countries return to their daily pursuit of national foreign policies'. It means that after establishing the mechanisms of Europeanisation, the extent of policy change at the national level must also be evaluated to examine the degree of the EU's influence.

The literature on the Europeanisation of foreign policy has not specifically explored the variation in changes in member countries' national policies (Baun and Marek, 2013; de Flers and Muller, 2012; Major, 2005; Major and Pomorska, 2005; Tonra, 2003; Wong, 2008; Wong and Hill, 2011). This may implicitly indicate an either/or approach to Europeanisation and overlook differences in outcomes of policy change. Hence, to avoid such dichotomy, this research draws on available studies (Borzel and Risse, 2003; Heritier, 2001; Radaelli, 2003; Schmidt, 2002; Vink, 2003) and develops five outcomes of Europeanisation in foreign policy: transformation, adaptation, fragmentation, resistance and no Europeanisation. Although certain aspects of these outcomes may overlap with existing scholarship, they have been developed to account for the specific characteristics of the EU foreign policy. Across these outcomes, a member state government's strategy determines the mechanisms through which EU-level initiatives affect national policies and the resulting Europeanisation outcomes. While fragmentation and no Europeanisation may occur under both strategies, transformation and

adaptation are confined to the cooperative strategy, whereas resistance is confined to the conditional dissent strategy.

Transformation happens when a member state government remodels its strategic policy objectives and aligns with an EU-level initiative by fundamentally changing its foreign policy (Borzel and Risse, 2003, p.70; Schmidt, 2002, p.901; Radaelli, 2003, p.37). Put differently, a country abandons its former policy line towards a country, region or issue area and shifts towards an EU-oriented policy. As such, transformation produces a paradigm shift (Hall, 1993, p.280) and alters a member state's overarching policy objectives. It occurs when a member state aligns with an EU-level initiative by fundamentally changing its foreign policy in areas where the EU's initiatives intersect without directly conflicting with the government's critical objectives. In this case, the government adopts a cooperative strategy and changes its foreign policy either through strategic action or strategic learning. Empirically, it can be observed through significant shifts in the discourse and statements of diplomats and government representatives, comprehensive changes in a member country's dealings with the issue in the CFSP and radical modifications to its foreign policy and national security strategies.

Adaptation takes place when a member state aligns with an EU-level initiative without altering its strategic policy objectives. This outcome is more likely when a government's strategic policy objectives are not significantly different from the EU-level initiative and when it adopts a cooperative strategy, leading to changes in its foreign policy through strategic action or strategic learning. Therefore, changes in a member state's national policy positions are non-fundamental and reflected in minor adaptations to the EU-level initiative (Heritier, 2001, p.54;

Radaelli, 2003, p.37).¹⁰ While there may be differences between a member state and the EU regarding how to best achieve desired objectives, they are likely to be marginal and related to policy instruments rather than overarching strategic objectives. Hence, adaptation does not lead to a member state's contestation of EU-level initiatives. Determining adaptation is not as straightforward as transformation because a country's national policy does not undergo significant changes. However, a state's consistent alignment with the EU-level initiative, emphasis by government officials and diplomats on harmony between national and EU-level policies and avoidance of an openly confrontational approach towards the EU despite some differences are indicators of this outcome.

Fragmentation occurs when a member state government supports the aspects of an EU-level initiative that align with its strategic policy objectives, while simultaneously expressing reservations about the elements that conflict with its strategic policy objectives. It is more likely when a government's strategic policy objectives and the EU-level initiative are not entirely congruous and when the government employs a cooperative or a conditional dissent strategy. When the government's strategy is cooperative, it does not resort to bargaining, and changes in the country's foreign policy happen through strategic action or strategic learning mechanisms. By contrast, when the government's strategy is conditional dissent, it resorts to bargaining and changes in the country's foreign policy occur through issue linkage or hostage-taking. Fragmentation preserves a country's overarching strategic objectives while the government selectively complies with elements of an EU-level initiative, contesting aspects

¹⁰ Radaelli (2003, p.37) defines adaptation as absorption, while Heritier (2001, p.54) uses an incremental change and absorption to describe what this study sees as adaptation and minor changes in a member state's national policy positions.

that conflict with its strategic policy objectives. The tensions between the national foreign policy and the EU-level initiative thus highlight the primary distinction between adaptation and fragmentation. The main difference between fragmentation and resistance, however, lies in the degree of compliance: under fragmentation, a member state exhibits at least some willingness to comply with the EU-level initiative, whereas resistance reflects a member state's continuous and comprehensive opposition to it. Empirically, fragmentation can be identified through periodic confrontational statements by government officials and diplomats directed at those aspects of the EU-level initiative that are considered highly critical to their strategic policy objectives.

The study defines an outcome of Europeanisation resistance when a member state government considers its strategic policy objectives entirely at odds with an EU-level initiative and consistently refuses to alter them.¹¹ The Europeanisation literature has used inertia to describe a lack of change as a result of the EU influence (Radaelli, 2003, p.37; Schmidt, 2002, p.901). By defining it as 'slowness or resistance to change', Schmidt (2002, p.901) noted that inertia happens when states face limited pressure to change their policies, and their long-term objectives are incompatible with EU-level policies. In this study, resistance denotes a situation in which a member state government's strategic objectives significantly differ from an EU-level initiative. In such cases, it employs a conditional dissent strategy, and changes in its foreign policy occur through issue linkage and hostage-taking mechanisms. A member state may

¹¹ This study does not consider de-Europeanisation (Muller, Pomorska and Tonra, 2021; Smith, 2021) or retrenchment (Radaelli, 2003, p.38) among the Europeanisation outcomes. It does not mean that Europeanisation is irreversible. However, we should first demonstrate that member states' foreign policies towards a country, region or issue area have, in fact, been changed due to the EU's influence before examining the reverse process of de-Europeanisation (see Copeland, 2016, pp.1126).

sustain its contestation without significant EU-level pressures in times when the Union's common policy is loosely defined and lacks clear directions. However, when critical CFSP decisions requiring unanimity have to be adopted, a member state is more likely to be under pressure in the face of highly incompatible national and EU-level positions. While there are no formal enforcement mechanisms in the CFSP, a member state's unyielding position may escalate to a point where the EU and fellow member states may consider extreme measures against it in non-foreign policy areas to overcome the impasse. Consequently, a member state may be forced to make a compromise and change controversial aspects of its foreign policy to facilitate a common agreement, even though it may also attain some concessions.

However, in the resistance outcome, changes in a member state's foreign policy position do not indicate a change in its strategic policy objectives. Rather, they result from pressures from other member states and the EU's multilevel governance structure, which may exert significant influence on a member state in non-foreign policy areas. Even when concessions are made to facilitate agreement, the state may still oppose aspects of the EU initiative, potentially undermining collective decisions. Therefore, resistance does not transform a member state's foreign policy but represents a forced change resulting from EU-level pressures and multilevel governance dynamics. It anticipates significant and continuous tensions between the national and EU levels, accompanied by EU-level pressures on a member state, distinguishing this outcome from adaptation and fragmentation. Empirical indicators of resistance are critical statements by government officials and diplomats regarding the incompatibility of a country's national preferences with an EU-level initiative, the employment of a conditional dissent

strategy and hard bargaining tactics, such as hostage-taking, and consistent and continuous confrontation between the government and the EU on the conduct of foreign policy.

The EU's influence leads to no Europeanisation when a member state does not change any of its foreign policy positions regarding an EU-level initiative (see Heritier, 2001, p.54). In foreign policy, it can be observed in two different scenarios. First, a member state may not need to change its national policy when it adopts a cooperative strategy and its strategic policy objectives completely align with an EU-level initiative. Second, a member state may be entirely against the EU-level initiative when it adopts a conditional dissent strategy and refuses to alter its foreign policy. This means that both cooperative and conditional dissent strategies and their related mechanisms can lead to the no Europeanisation outcome. Therefore, no Europeanisation may be possible if a member state manages to formulate the EU-level initiative in line with its strategic objectives (which, in turn, does not require any changes at the national level), or if it maintains its incompatible national position despite pressures from other member states and the EU. Empirically, the first scenario can be identified by a member state's success in shaping the EU foreign policy so that it fully reflects its strategic objectives, the full alignment between a member state's pre-existing national policy position and the EU-level initiative and statements by government officials and diplomats defining the national and the EU-level policy along the identical lines. The second scenario can be characterised by the same empirical conditions as resistance, with the key distinction that the member state government refuses to alter its national policy position by withstanding pressures from the EU level.

An EU-level initiative (independent variable)	A government's interpretation of an EU-level initiative	Strategies	Dimensions	Mechanisms	Europeanisation outcomes (dependent variable)
The EU's common foreign policy (e.g., Five Guiding Principles, supporting Ukraine for 'as long as it takes') An EU-level policy driven by a group of member states (e.g., capability coalitions in support of Ukraine)	An initiative does not affect a government's strategic policy objectives	Cooperative strategy	Downloading Cross-loading	Strategic learning, Strategic action	Transformation Adaptation Fragmentation No Europeanisation
	An initiative challenges a government's strategic policy objectives	Conditional dissent strategy	Downloading	Issue linkage, Hostage-taking	Fragmentation Resistance No Europeanisation

TABLE 1. Europeanisation of foreign policy

2.5. Summary

The chapter reviewed the literature on Europeanisation and established a theoretical framework for this research. First, it presented various applications of the concept and argued that Europeanisation retains its relevance in elucidating changes in national foreign policy despite its mainly intergovernmental nature. Second, the chapter outlined potential definitional challenges related to Europeanisation and described the concept as changes in

member states' national foreign policies due to their participation in the EU. This definition determined downloading and cross-loading as the two dimensions of Europeanisation and excluded uploading. In this context, this research identified changes in the substance of member states' national foreign policies as the decisive element of examining Europeanisation, while changes in policy-making procedures and strategies were treated as antecedent conditions to analyse changes in policy substance rather than direct indicators of Europeanisation in themselves.

Third, it was asserted that the constructivist perspectives emphasising normative and ideational factors in EU foreign policy-making encounter difficulties when member states employ bargaining to achieve their policy priorities. Therefore, the chapter put forward the RCI perspective to explain the Europeanisation of foreign policy. It was contended that significant foreign policy issues tend to be dominated by the rationalist logic, as member states are more inclined to defend their strategic policy objectives when they are at stake and threatened. Thus, expected utility maximisation and strategic behaviour provided a more comprehensive picture of the Europeanisation of foreign policy. By introducing a government's interpretation of a country's national policy priorities as an interest-based intervening variable, the chapter distinguished between cooperative and conditional dissent strategies in a member state's engagement with EU-level initiatives. This differentiation facilitated a division of labour among the mechanisms of change and underscored strategic learning, strategic action, issue linkage and hostage-taking as the key mechanisms of Europeanisation. Simultaneously, other potential mechanisms were evaluated and ultimately discarded for this research. Last, it was argued that the extent of changes in member states' national foreign policies could result in

five distinct outcomes of Europeanisation: transformation, adaptation, fragmentation, resistance and no Europeanisation.

3. EMPIRICAL BACKGROUND

This chapter provides the historical context and lays the groundwork for examining the Europeanisation of Hungary's and Poland's foreign policies between 2014 and June 2024 in the fifth and sixth chapters. The first section reviews the principal determinants and evolving dynamics of the EU's foreign policy towards Russia and Ukraine from the 1990s up to the Ukraine crisis in 2014. It highlights the EU's optimistic perception of relations with Russia and the comparatively lesser significance accorded to relations with Ukraine by focusing on key EU policies and initiatives towards the two countries. The second and third sections delve into Hungary's and Poland's national foreign policies towards Russia and Ukraine in the specified time period. These sections focus on each country's strategic policy objectives and their historical relations with Russia and Ukraine (see Tables 2 and 3), and how these factors interacted with EU-level initiatives on the two countries.

3.1. EU's foreign policy towards Russia and Ukraine before 2014

3.1.1. EU's foreign policy towards Russia prior to the 2014 crisis

Following the dissolution of the Soviet Union, EU member states aimed to rebuild political ties and establish economic cooperation with Russia, hoping this would integrate the country into the liberal international community (Haukkala, 2010, p.73-74, 2015, p.31; Interviews 1,3, 5,

11). This was reflected in the Partnership for Cooperation (PCA) and the EU's institutionalisation of relations with Russia within the normative framework (European Union, 1997; Timmins, 2002, p.81). However, the normative basis of cooperation largely remained in rhetoric, as the EU's *modus vivendi* relied heavily on pragmatic and constructive engagement with Russia (Casier, 2013, p.1380). The 1999 CFSP Common Strategy on Russia defined the bilateral relationship as a strategic partnership despite the delay in the ratification of the PCA due to Russia's war in Chechnya (European Council, 1999a). A senior EU diplomat (Interview 2) highlighted the EU's policy towards Russia at the dawn of the century:

I was very controversial at the time. I thought we had to work with these guys, but we couldn't give them anything at any price. Let's give them what we can and help them achieve the rest so that they become normal, because they are too big, and they have a weird past. It didn't work. I'm not saying we are completely innocent, but certainly, I don't think that we are the culprit of that.

Developments in the 1990s displayed that the political will of the most politically and economically influential member states dominated the EU's foreign policy-making towards Russia over the emphasis on the normative agenda (Forsberg and Herd, 2005, p.455). They shaped the EU's common foreign policy according to their strategic objectives, at times even at the expense of broader EU unity (e.g., Germany's role in the 1994 PCA and 1999 Common Strategy, the Nord Stream pipeline) (Schmidt-Felzmann, 2008, p.173). Unsurprisingly, the EU's Eastern policy was sometimes described as Russia-first, increasingly reflecting the policy preferences of these member states, particularly Germany (Interviews 4, 5, 11, 18; see also Bottger, 2019, p.45; Copsey, 2008, p.4; Nitoiu, 2016, p.378). Several senior EU diplomats described Germany's prioritisation of relations with Russia vis-à-vis the East as an automatic reaction of any German leader or politician (Interviews 11, 18). In the words of a former senior Polish diplomat (Interview 1), 'Last two–three decades ... there was psychological and political

dependence of German or Italian line of cooperation with Russia'. Thus, bilateral channels between individual member states and Russia continued to play a significantly greater role than the various frameworks for EU–Russia cooperation (see also Bechev, 2013, p.200). For its part, Russia was interested in a privileged partnership with Germany, as its political elite believed that this could increase its influence in Central Europe and shape the EU's foreign policy towards former Soviet republics by leveraging Germany's considerable weight in EU decision-making (Interview 18).

The EU's hopes for a mutually beneficial partnership and constructive engagement with Russia following the start of Putin's presidency led to the four Common Spaces in 2003 and a comprehensive package of Road Maps in 2005 (European Commission, 2005b). An important turning point in EU–Russia relations was 2004, as it marked three important events. First, the increase in member states from ten to twenty-five following the enlargement meant that reaching a common EU position on Russia would theoretically be more complicated. This was buttressed by the accession of 'the New Cold-warriors' (Lithuania and Poland), who had grown increasingly sceptical of Russia's intentions due to historical factors (see Section 3.3.1; Leonard and Popescu, 2007, p.48).¹² Second, the launch of the European Neighbourhood Policy (ENP) and Russia's refusal to participate and demand for a special relationship separated the EU's policy towards Russia from its policy towards the ENP countries (Haukkala, 2010, p.134). Although the ENP did not immediately affect the EU policy-making, it set the stage for geopolitical differences between the EU and Russia in the following years. Lastly, the Orange

¹² For instance, Poland and Lithuania did not hesitate to express their discontent with Russia's policies during the EU–Russia negotiations to renew the PCA in 2006 and 2008, respectively (DW, 2006; Euractiv, 2008).

Revolution and the EU's perceived role raised concerns in Russia regarding the objectives of the Union's normative agenda and its role in the region (Haukkala, 2015, p.32, 2016, p.659). The Commission's 2004 report on Russia accentuated growing divergences between the two sides and Russia's increasing assertiveness towards the new member states (European Commission, 2004). The EU–Russia relationship was described as 'a marriage of convenience' (Casier, 2017, p.13), with many underlying structural issues remaining unresolved in bilateral relations. 'I have seen him [Putin] and the Russians operate. We had so many problems, Siberian overflight tariffs, the third Energy Package ... and not a single problem was fixed. The Russian administration wasn't an easy partner to work on anything', highlighted a senior EU diplomat (Interview 2) and added:

Even if you can find papers where we declared Russia our strategic partner, clearly, that was diplomatic ... I didn't have the feeling that we had a strategic partnership. It [Russia] has never been a normal partner. Certainly, it's not like Canada or anything close.

Signs of simmering tensions were evident, inter alia, in three cases in the lead up to the 2014 Ukraine crisis: Russia–Ukraine gas disputes in 2006 and 2009, Russia's invasion of Georgia in 2008 and the launch of the EaP in 2009. The Russia–Ukraine gas dispute in 2006 and Russia's reduction of supplies to Europe through Ukraine shocked the EU countries.¹³ In response, the EU took several measures to ensure its energy security against potential future disruptions. The Commission's 2006 Green Paper, 2007 Strategic Energy Review and 2008 review of the European Security Strategy (ESS) outlined leading suppliers' potential usage of energy for political purposes and underlined the need to diversify suppliers and transit routes by emphasising worries about the EU's energy dependence (Andoura, 2012, p.246; Council of the

¹³ The year before, in 2005, Russia's share constituted more than 40% of the EU's gas imports and more than 30% of oil imports (Eurostat, 2007).

EU, 2008b, p.5; Youngs, 2009a, p.3). These steps were complemented by the Commission's third Energy Market Liberalisation Package in 2009, which aimed to improve the internal functioning of the EU energy market by unbundling energy supply and generation from transmission, thereby indirectly limiting Gazprom's monopolistic role (Dyson and Konstadinides, 2016, p.540). After the 2009 Russia–Ukraine gas dispute, the Commission undertook further steps to diversify its energy sources by setting up reverse gas flows (Casier, 2016, p.772; European Commission, 2011). However, these efforts were undermined by the majority of member states' energy relations with Russia. They maintained their competences to sign bilateral energy agreements after the Lisbon Treaty (Keukeleire and Delreux, 2014, p.223), and the EU-level steps did not translate into tangible practical action. A senior EU diplomat (Interview 11) summarised the reasoning behind some member states' persistence with imports of Russian energy:

Other countries couldn't beat these prices, and, in a way, the deliveries were also reliable. They were not reliable, of course, once in 2006 and 2009, when they cut off the gas for some, but apart from this, for many years, Russia or the Soviet Union, in the past, delivered a fairly stable gas and oil to the EU.

Germany and some western member states, such as Italy and France, still considered Russia a more reliable partner than alternative suppliers and signed bilateral deals with Gazprom (Youngs, 2009a, pp.83-89). In this sense, the Nord Stream deal between Germany and Russia attracted severe criticism from the CEE countries, such as Lithuania and Poland, who warned about Russia's weaponisation of energy exports for blackmailing the EU (Schmidt-Felzmann, 2011, p.584). A former Polish policy-maker (Interview 20) highlighted the prevailing view in western capitals:

In Germany, there was a hope for many years among the political elite, even among my friends in the CDU, that we can live and cooperate with Russia, and we can make Russia

through economic cooperation more 'European, civilised or more western'. Until the war started, the German politicians, the French elite, they were still naive and were thinking that we can still cooperate with Russia, and this is the best tool to westernise them.

The EU's reaction to Russia's invasion of Georgia in 2008 did not generate a significant policy shift, as western member states and mainly Germany were against isolating Russia and favoured cooperation based on interdependence (Chivvis and Rid, 2009; Dempsey, 2009). While the 2008 review of the ESS stated the worsening bilateral relations with Russia over Georgia, the document refrained from using heavily critical language against the country (Council of the EU, 2008b, p.10). Further, the EU-backed independent report concluded that Georgia was responsible for triggering the war in 2008 (France24; Heritage, 2009). Negotiations with Russia over a new framework for cooperation briefly stalled due to the war but nevertheless continued, culminating in the Partnership for Modernisation (P4M) in 2010 (Council of the EU, 2010), which aimed to lay the foundation for a new EU–Russia agreement to replace the expired PCA (Timmins, 2011, p.197).

The trajectory of the EU–Russia relations was more significantly affected by the launch of the EaP in 2009.¹⁴ It exacerbated Russia's concerns about the Union's policy objectives, as Moscow viewed the initiative in zero-sum terms and considered it a serious threat to its interests in former Soviet Union countries (Howorth, 2017, p.128). In response, Russia founded the Eurasian Customs Union (ECU) in 2010 as a rival project, consisting of Belarus, Kazakhstan and Russia. It was designed to eliminate physical borders between the members, improve

¹⁴ The initiative aimed to deepen the EU's political relations and economic cooperation with its six eastern partners (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine) and ultimately conclude a series of AAs that would lead to DCFTAs (Council of the EU, 2009).

economic cooperation and, most importantly, keep them within Russia's sphere of influence (Dreyer and Popescu, 2014).

The EU's hopes to maintain regular cooperation with Russia were proven overly optimistic and resulted in significant difficulties in simultaneously conducting its Russia and the EaP policies. First, the separation of the two policies generated a disjointed EU strategy. Although the EU initially declared that the EaP would be compatible with its strategic partnership with Russia, the two policies grew increasingly distant as time passed (Delcour, 2018, pp.22-23). In this sense, the division between member states favouring close relations with Russia and those prioritising the EaP produced constant tensions in implementing these policies (Delcour, 2018, p.24). Second, and related, the EaP was largely devoid of geopolitical considerations, inadvertently turning the project into a competition between the EU and Russia over the participating countries (Freire and Simao, 2017, p.172; Haukkala, 2016, p.661; Howorth, 2017, p.128). The implications of the initiative in relations with Russia were not fully realised until 2013. Highlighting the EU's fairly good relations with Russia during President Medvedev's tenure, a senior EU diplomat (Interview 11) noted:

Not that we had any big illusions, but we were pursuing our bilateral relations in a realistic way, obviously with a focus on economic policy, energy policy, the Nord Stream 1 ... While we had always critical remarks on the human rights side of things, we had fairly detailed exchanges, regular EU–Russia summits twice per year, one in the EU and one in Russia.

The series of EU–Russia summits between 2010 and 2014 largely failed to achieve a breakthrough in relations. While the EU and Russia settled their disagreement over Russia's World Trade Organisation (WTO) membership in 2012, differences between the EU's planned AAs with the EaP partner countries and Russia's ECU were somewhat disregarded (Delcour,

2018, p.23). The EU's approach until the 2014 Ukraine crisis was described in terms of a 'strong element of sleep-walking', which resulted from the Union's slow assessment of its policies in the face of Russia's changing threat perceptions (House of Lords, 2015, p.6). Therefore, until Russia began pressuring the EaP countries to prevent them from signing the AAs, the EU remained hopeful for a relatively smooth co-existence of its policies towards Russia and the EaP (Haukkala, 2016, pp.659-662). A senior EU diplomat (Interview 11) stated: 'I think nobody really assumed seriously that Ukraine would backtrack from the AA. It was a surprise. We didn't expect Russia to really put so much pressure on Yanukovich and not let him sign the AA'. Ukraine's rejection of the AA at the EaP summit in Vilnius in November 2013 did not initially constitute a major part of the EU's Russia policy as the Union was still reluctant to be involved in a geopolitical competition (Haukkala, 2015, p.34). However, the Maidan protests and Russia's subsequent annexation of Crimea would irreversibly change the EU's Russia policy for the foreseeable future.

3.1.2. EU's foreign policy towards Ukraine prior to the 2014 crisis

Political relations between the EU and Ukraine started immediately after Ukraine's independence referendum on 1 December 1991. Closer ties with the EU provided an impetus to Ukraine's economic development and helped the country balance against Russia's geopolitical interests (Wolczuk, 2008, p.90). During Kravchuk's presidency, the PCA with the EU signed in 1994 represented a significant development in bilateral relations (Shyrokykh, 2018, p.836). However, Ukraine's earlier expectations of a swift upgrade of relations did not resonate within the EU. Namely, France's and Germany's preferences for developing a

partnership with Russia and southern member states' attention to the Mediterranean area prevented the specific EU focus on Ukraine (Youngs, 2009b, pp.359-360). The EU's foreign policy towards Ukraine was secondary to its Russia-first policy and did not match Ukraine's intention to deepen political relations (Interview 18; Pavliuk, 2001, cited in Kubicek, 2005, p.277).

Contrary to Ukraine's expectations, the EU Council meeting on 10–11 December 1999 did not offer the country a membership perspective. Instead, it adopted a Common Strategy to strengthen the bilateral strategic partnership by supporting Ukrainian democracy, security and economic development (European Council, 1999b). The initial optimism for cooperation in the first years of Kuchma's presidency subsided at the beginning of the new century, as Kuchma's multi-vector foreign policy strategy aimed to balance Russia and the EU (Wolczuk, 2008, p.90). The government's authoritarian practices and gradual shift in foreign policy towards Russia in the lead-up to the Orange Revolution complicated the EU's engagement with Ukraine (Kubicek, 2005, p.277).

2004 marked a critical point in EU–Ukraine relations. First, the Orange Revolution and the victory of pro-European Yushchenko in the repeated presidential election set the stage for Ukraine's closer engagement with the EU. Second, the ENP provided an institutional context for strengthening cooperation and, more importantly, separated the EU's policy on Russia from its relations with other neighbouring countries (Delcour, 2018, p.21; Dragneva and Wolczuk, 2015, p.39). Third, the EU membership of the CEE states increased the number of Ukraine's

allies in the EU, who would consistently advocate closer EU engagement with the country (Nitoiu, 2016, p.378).

The EU's initial response to the tense political situation during Ukraine's 2004 presidential election was reserved. Member states, such as Germany, France and Spain, did not favour active EU involvement over concerns about worsening relations with Russia, while new member states, Lithuania and Poland, pushed to replace the EU's unofficial Russia-first policy with the Ukraine-first one (Youngs, 2009b, p.361; Youngs, 2011, pp.35-38). The High Representative for the CFSP, Solana's attempts did not generate a decisive common policy due to the efforts not to undermine the upcoming EU–Russia summit (Pifer, 2007, 30). When politically and economically stronger members, Germany, France and Spain were unwilling to take the lead, the Polish President Kwasniewski's and the Lithuanian President Adamkus's strong advocacy contributed to formulating the EU's common position regarding the Orange Revolution (Youngs, 2009b, p.363). The EU mediated between Yanukovych and Yushchenko, and the two candidates agreed to rerun the presidential run-off on 26 December 2004; however, despite the eventual consensus, some member states approached the developments in Ukraine in the context of their relations with Russia (Pifer, 2007, p.37; Youngs, 2009, p.361). This demonstrated that the Union's formal stance emerged out of necessity and mainly due to the advocacy of the new member states, Lithuania and Poland, rather than representing a carefully designed strategy.

The launch of the ENP in 2004 provided an impetus for improved EU–Ukraine cooperation despite the absence of short-term incentives for participating countries (Delcour, 2018, p.21;

Dragneva and Wolczuk, 2015, p.39; European Commission, 2005a).¹⁵ However, the early optimism after the Orange Revolution faded in the following years despite President Yushchenko's commitment to EU membership (DW, 2005), as divisions among member states prevented a common EU position on Ukraine. Namely, while eastern EU members and Ukraine's allies, such as Hungary, Lithuania, Poland and Slovakia, lobbied for offering EU membership to the country, Belgium, France, Germany, the Netherlands and Spain were against such an idea (Youngs, 2011, pp.41-45). Noting the EU's unwillingness to give a membership perspective to Ukraine and other potential candidates due to the fatigue after the 2004 enlargement, a senior EU diplomat (Interview 2) remarked:

Ukraine was a country with many internal problems in terms of corruption, independence or dependence of the judiciary, the rule-of-law in general, economy ... Certainly, Ukraine wasn't on a path to accession and wasn't prepared to join the EU. Therefore, the whole debate about whether Ukraine should join the EU, which is a merit-based process, was absolutely premature.

The EU adopted the 'door is neither closed nor open' position by acknowledging Ukraine's EU aspirations but stopping short of making tangible commitments to the country due to a lack of internal consensus among member states (Youngs, 2011, p.41). The Commission President Barroso underlined that both Ukraine and the EU were not ready to proceed with accession talks in the annual EU–Ukraine meeting in 2006 (Euractiv, 2006). Ultimately, opposition from western member states, particularly Germany, weak democratic progress after the Orange Revolution and the EU Council's 2006 decision to base enlargement on consolidation, rigorous conditionality and communication shelved Ukraine's accession prospects for the foreseeable future (Council of the EU, 2006; Youngs, 2011, p.42). Some member states' reluctance to harm

¹⁵ The most important aspect of the ENP was that the EU's policy towards Russia and other former Soviet republics became institutionally separated and decoupled, which had been conducted in a hierarchical order until 2004 (Casier, 2019, p.77).

their strategic partnerships with Russia by interfering in Russia's sphere of influence, limited US support and the Commission's refusal to turn the ENP into an accession instrument also contributed to the EU's common policy towards Ukraine (Kaminska, 2014, p.142; Roth, 2007, p.517-518).

Therefore, instead of a path to membership, the EU proposed a new enhanced agreement (later called an Association Agreement) to Ukraine on the condition that the 2006 parliamentary election were democratic (Dragneva and Wolczuk, 2015, pp.42-43). Although the talks over the new agreement started after the election, member states such as France, Germany and Spain used Yanukovych's relatively distant and pragmatic approach to the EU and instability in Ukraine to exclude membership discussions from the agenda of the EU-Ukraine relations (Youngs, 2011, p.43). Thus, despite improving the previous PCA and underlining the negotiations over the DCFTA, the new enhanced agreement did not meet Ukraine's expectations (Council of the EU, 2008a).

The official launch of the EaP in 2009 marked an important development in the EU's foreign policy towards the former Soviet republics.¹⁶ It qualitatively changed the nature of the EU-Ukraine relations and introduced the possibility of signing the AA, which could place the country on the path to future EU accession (Council of the EU, 2009; Dragneva and Wolczuk, 2015, p.45; Stegnyy, 2011, p.55). However, the necessity to achieve a broader EU consensus obstructed the efforts of some CEE and the V4 countries to include an enlargement perspective

¹⁶ The EaP aimed to stabilise the eastern neighbourhood by fostering domestic reforms, harmonising national legislation with the EU and laying the groundwork for closer economic cooperation between the EU and the participating countries (Cadier, 2014, p.78).

in the EaP, rendering the final text more modest in terms of political objectives (Copsey and Pomorska, 2014, p.435; Dangerfield, 2009, p.1747). From the Ukrainian perspective, the absence of an EU membership perspective and the EU's bundling of eastern countries into a single framework was perceived as a step backwards, as some of these countries did not have meaningful short-term prospects of becoming EU members (Dragneva and Wolczuk, 2015, p.45).

Following the 2010 presidential election, President Yanukovich reinforced Ukraine's ambition to join the EU through legislation affirming the country's objective of EU membership (Dragneva and Wolczuk, 2015, p.56). This goal was accompanied by a balancing act between the EU and Russia as the president aimed to maximise the benefits of close relations with both parties for his domestic goals (Cadier, 2014, p.81). In the light of Yanukovich's opportunistic foreign policy, the initiation of the EU–Ukraine AA negotiations on 30 March 2012 did not come as a surprise. However, the EU struggled to pursue a coherent strategy in implementing the EaP. Initially, it stressed democratic reforms and emphasised that Ukraine must address politically motivated convictions by releasing the opposition leader Tymoshenko before signing the AA (Council of the EU, 2012). The EP's Cox-Kwasniewski mission to Ukraine in 2012–2013 intended to persuade Ukraine to implement reforms and release political prisoners (Nitoiu and Sus, 2017). However, the EaP gradually evolved into a geopolitical project despite the EU's initial reluctance to frame it as such (Smith, 2015, p.532). Notwithstanding the failure of the Cox-Kwasniewski mission, the EU was prepared to sign the AA with Ukraine at the Vilnius meeting in November 2013. Consequently, the EU's offer did not meet Ukraine's expectations and backed the country into a corner, effectively leaving it with only two choices. Russia's

veiled threats and sanctions, the promise of a favourable gas deal, a \$15bn aid package and various trade concessions led to Ukraine's rejection of the AA at the EaP summit in Vilnius in November 2013 (MacFarlane and Menon, 2014, pp.97-98; The Guardian, 2013), which paved the way for the Maidan protests at the end of 2013.

3.2. Hungary's foreign policy towards Russia and Ukraine before 2014

3.2.1. Hungary's pre-2014 Russia policy

Hungary's foreign policy in the post-Communist period was driven by three core objectives: integrating into Euro-Atlantic structures, establishing cooperative relations with bordering countries and supporting Hungarian minorities in the neighbouring states (Racz, 2012b, p.165; Vegh, 2015, p.49). Hence, when the priority was to establish Hungary's position within the EU and NATO, relations with Russia did not occupy a central place in the country's foreign policy strategy. Despite the Soviet invasion in 1956, historical grievances did not significantly influence Hungary's Russia policy. In fact, unlike Poland, Hungary did not have a pre-defined Eastern policy in the absence of historical motivations and commitments to the region (Interviews 19, 23, 30; Racz, 2012b, pp.162-163).

For Hungary, Russia was not a crucial political and economic actor in the region after the dissolution of the Soviet Union (Gyori et al., 2015, p.55). Energy dependence, the withdrawal of the Soviet troops and the NATO accession process dominated Hungary's early post-

communist foreign policy towards Russia (Dangerfield, 2013, p.172). Due to these factors, Hungary aimed to achieve a smooth transition in bilateral relations by creating a new framework for future bilateral cooperation (Racz, 2015, p.178). The Horn government was determined to complete Hungary's NATO accession process despite Russia's position on the issue, which did not significantly affect the country's relations with Russia (Jeszenszky, 2007, p.47; RFE/RL, 1996; Tarrosy and Voros, 2014, p.140). It continued to engage with the country and maintain positive relations through economic cooperation and high-level contacts following the 1994 election (Dangerfield, 2013, p.173).

Hungary's foreign policy towards Russia took an adverse shift under the first Orban government following the 1998 parliamentary election. Russia's growing attempts to interfere in the region, the Orban government's fear of Russian imperialism and its openly anti-Russia, anti-communist stance, combined with Russia's lack of economic interest in Central Europe, led to a deterioration in bilateral relations (Meszerics, 2004, p.24; Poti, 2002, cited in Dangerfield, 2013, p.174; Racz, 2015, pp.178-179; RFE/RL, 1999). Nevertheless, the negative trend in relations was short-lived. After the 2002 election, the coalition government led by PM Medgyessy engaged in a reset of Hungary's Russia policy, as the trade opportunities in the recovered Russian market and energy relations were considered essential for Hungarian interests (Dangerfield, 2013, p.174; Terenyi, 2009, p.21). The policy resonated well in Russia, and numerous high-level meetings were intended to consolidate positive political and economic relations between the countries (Racz, 2015, pp.181-182).

Following its EU membership, Hungary did not automatically become a passive policy taker within the EU and maintained its independent foreign policy towards Russia (Tarrosy and Voros, 2014, p.142). The 2004 National Security Strategy identified the CFSP as a crucial instrument in achieving national policy preferences but also argued for balancing the EU's and Hungary's interests (Hungarian MFA, 2004, pp.11-12; see also Meszerics, 2004, p.25; Toro, 2013, p.42). Considering that Hungary imported 83% of its gas from Russia (Dangerfield, 2013, p.175), the priority area for the government was to ensure diversification of energy supplies through the common EU policy (Pomorska, 2017, p.58). At the same time, PM Gyurcsany pursued a pragmatic policy towards Russia and sought to achieve energy security by diversifying gas supplies and securing favourable deals (Gyori et al., 2015, p.58). Further, the Hungarian government adopted a balanced policy during Russia's invasion of Georgia and refrained from taking unilateral action that might jeopardise bilateral relations, which demonstrated Hungary's determination to proceed with its Russia strategy (Gyori et al., 2015, p.59). Although the new PM Bajnai distanced his country from Russia after Gyurcsany's resignation, he did not make fundamental changes to Hungary's Russia policy (Varga, 2009, p.53).

Following the 2010 election, the Fidesz government led by PM Orban introduced an Eastern Opening strategy, which aimed to improve Hungary's economic position through good bilateral relations with emerging economic powers and reduce the country's economic dependence on the West (Vegh, 2015, pp.50-51; Visnovitz and Jenne, 2021, p.696; see also Chapter 5). One of

the key directions of the new strategy was maintaining close relations with Russia.¹⁷ The Hungarian foreign policy review document defined Russia as ‘a partner of exceptional significance for Hungary’ and argued for ‘finding mutually acceptable solutions for both sides for the contentious economic issues’ (Hungarian MFA, 2011, p.39). However, the pragmatic relationship with Russia did not mean the country’s complete decoupling from the Euro-Atlantic structures (Visnovitz and Jenne, 2021, p.697). In this regard, the Eastern Opening was balanced by the Global Opening strategy, which, implemented by the MFA,¹⁸ maintained Hungary’s Euro-Atlantic orientation and ensured continuity in foreign policy (Interview 16; Muller and Gazsi, 2023, p.406).

During Hungary’s EU Council presidency, the Orban government did not promote its Russia policy at the EU level, limited itself to supporting Russia’s WTO membership and the EU–Russia visa facilitation process and prioritised bilateral channels in relations with Russia (Racz, 2015, pp.185-186). In general, Hungary concentrated on improving economic relations, and the energy area was at the core of its engagement with Russia in order to diversify energy sources and gas routes. Overcoming dependence on Russian gas pipelines, especially regarding volume, remained difficult despite investments in diversification and alternative projects (Interviews 8, 12). Thus, Hungary became an active proponent of Russia’s South Stream project, and the Hungarian MOL officially withdrew from the EU-supported Nabucco project in 2012 (The Wall Street Journal, 2012). Faced with criticism about Hungary’s and the EU’s

¹⁷ As the Fidesz leader, Orban established close contacts with Russia during his 2009 visit to Moscow, despite previously criticising the government’s deepening cooperation with the country (Interview 16).

¹⁸ For its part, the Eastern Policy strategy was pursued by PM Orban’s Office under the supervision of the State Secretary for Foreign and External Economic Affairs Peter Szijjarto (Vegh, 2015, p.51).

diverging positions, PM Orban justified the decision on economic grounds (Dangerfield, 2013, p.176). Further, Hungary signed an agreement with Rosatom to build two nuclear reactors in Paks with a €10 billion loan from Russia (RFE/RL, 2014). Despite Hungary's preference for deepening bilateral ties, the Orban government's policy did not significantly deviate from the EU's common Russia policy. Admittedly, Hungary remained silent in the face of deteriorating human rights in Russia after the 2011 parliamentary election and prioritised the economic aspects of EU–Russia cooperation (Dangerfield, 2013, p.182; Racz, 2012a, p.64). However, as EU–Russia relations remained relatively stable until 2014, Hungary's Russia policy did not create considerable tensions with the EU's common Russia policy.

3.2.2. Hungary's pre–2014 Ukraine policy

One of the three main strategic objectives of Hungary's foreign policy after the collapse of communism was its commitment to Hungarian minorities in neighbouring countries (Varga, 2009, p.48; Vegh, 2015, p.49). The issue of the Hungarian minority has since played a major role in the country's Ukraine policy. Regardless of the party affiliation, respective governments have strived to protect the rights of approximately 150 thousand ethnic Hungarians in the Trans-Carpathian region of Ukraine (Interviews 13, 19, 22, 30).¹⁹ In this context, the agreement on the protection of minorities between Hungary and Ukraine was signed in May 1991 and was complemented by the 'Basic Treaty' signed in December 1991.²⁰

¹⁹ For instance, the Antall Doctrine was based on the notion that Hungarian minorities are not treated fairly, and that they should have a veto right on interstate agreements signed by their host countries (Poti, 2002, pp.3-4).

²⁰ The Treaty rejected the use of military force, underlined the two sides' commitment to the inviolability of borders, laid the groundwork for economic cooperation between Hungary and Ukraine and reaffirmed the parties' respect for the rights of minorities (Deme, 2003, p.288-290; Poti, 2002, pp.2-3).

Addressing the minority issue was also essential for Hungary's Euro-Atlantic orientation. Internal discussions about potential border changes were quickly dismissed as the post-Cold War order made territorial claims impossible (Jeszenszky, 2007, p.60). After the 1994 election, the Horn government aimed to secure guarantees for Hungarian minorities through the country's Euro-Atlantic integration (Hettyey, 2023b, p.161; Varga, 2000, p.123, 128). Although mutual high-level visits and Ukraine's support for Hungary's NATO membership improved bilateral relations, the priority of establishing good relations with Russia and the lack of political commitment constrained Hungary's foreign policy towards Ukraine (Poti, 2002, p.6; Racz, 2011, p.167; Varga, 2000, p.20). The first Orban government took some steps to define Hungary's relations with eastern neighbours once the objective of joining the EU and NATO was put on a clear track (Varga, 2000, pp.128-129). However, it mainly focused on addressing the minority issue and overlooked other areas of cooperation with Ukraine (Poti, 2006, p.66). The period was characterised by Ukraine's unilateral attempts to increase cooperation and Hungary's negligence of bilateral relations (Poti, 2006, p.66). The decree on the basic principles of Hungary's security and defence policy did not dedicate a special place to Ukraine and focused on a wider CEE and the importance of expanding stability in Europe (Hungarian Parliament, 1998). Further, the MFA's 1999 Strategy document and Hungary's 2002 National Security Strategy did not go beyond specifying Ukraine as a 'regional medium power' and emphasising the importance of a stable and independent Ukraine in preventing crises in the post-Soviet space (Poti, 2006, p.65).

Following accession to the EU, Hungary adapted its three essential post-communist foreign policy objectives to the new environment (Racz, 2012, p.169). The country's strategic policy objectives and Ukraine policy remained largely intact, and the 2004 National Security Strategy affirmed Hungary's support for Ukraine's Euro-Atlantic ambitions, democratic transition and strategic importance for developing bilateral economic cooperation (Hungarian MFA, 2004, p.8, 16). However, the Gyurcsany government was not actively involved in the EU's efforts to support the Orange Revolution due to the importance of relations with Russia and the uncertainty around Yushchenko's approach to national minorities (Kiss and Zahoran, 2007, p.52; Poti, 2006, p.72). Hungary's 2008 Foreign Relations Strategy mentioned that the country pursues a balanced policy between the southern and eastern directions of the ENP and underlined backing for Ukraine's and Moldova's EU ambitions (Hungarian MFA, 2008). However, it was not accompanied by a specific strategy to support Ukraine at the EU level. Hungary's influence in the EU's Ukraine policy was not as effective as that of Poland after the EU enlargement due to the lack of shared history and connections with eastern Europe (Racz, 2011, p.146).

Instead, the Hungarian diplomacy mainly supported other countries' initiatives towards Ukraine within the ENP. The Gyurcsany government was aware that the failure to contribute to the EU's Eastern policy would significantly reduce Hungary's influence in the EU (Dangerfield, 2009, p.1739). Although the EaP emerged as a Polish–Swedish proposal, it was coordinated with other V4 partners and strongly supported by Hungary (Sadecki, 2018, p.266; Toro, Butler and Gruber, 2014, p.384). Thus, Hungary's foreign policy towards Ukraine was in line with the EU's common strategy. To be sure, the country had its own interests and

prioritised energy security and the rights of the Hungarian minority in relations with Ukraine (Embassy of Ukraine in Hungary, 2012; Racz, 2010, p.27). Nevertheless, Hungary's policy preferences and Ukraine strategy did not contradict the EU's common policy line.

The Orban government's introduction of the Eastern Opening strategy (see Chapter 5) did not significantly alter Hungary's strategic objectives towards Ukraine. Hungary remained committed to conducting its foreign policy through both bilateral and EU channels (Hettyey, 2023b, p.167). Ukraine remained a priority within the EaP, as the 2011 Hungarian foreign policy review document identified the country as Hungary's largest neighbour and emphasised the government's commitment to economic cooperation and energy security in eastern Europe (Hungarian MFA, 2011, p.24). Hungary regarded Ukraine's independence as one of its strategic foreign policy objectives, and Fidesz policy-makers in the Hungarian Parliament supported the EU-Ukraine AA in 2013 (Hettyey, 2023a, p.11). However, the government's efforts to include Ukraine's specific commitment to minority rights in the AA negotiations were less successful (Hettyey, 2023b, p.170; Vizi, 2013, p.64). The Hungarian government took a cautious position when the Maidan protests started, as it feared that the potential nationalist government in Ukraine might renege on concessions made by Yanukovych in 2012 concerning the regional language status of minority languages (Sadecki, 2014a, p.36). Thus, while not acting against the EU's common line, Hungary was not at the forefront of the EU's endeavours to respond to a volatile situation in Ukraine.

Country	Period	Strategic policy objectives
Russia	1990s–2004	Establish stable bilateral relations while prioritising Hungary's EU and NATO accession
	2004–2014	Pursue pragmatic economic cooperation, particularly in the fields of energy and trade.
Ukraine	1990s–2004	Protect the rights of the Hungarian minority in Trans-Carpathia while supporting Ukraine's sovereignty.
	2004–2014	Support Ukraine's EU integration in a pragmatic manner while maintaining Hungary's national interests and a continued focus on minority rights.

TABLE 2. Hungary's strategic policy objectives regarding Russia and Ukraine pre–2014

3.3. Poland's foreign policy towards Russia and Ukraine before 2014

3.3.1. Poland's pre–2014 Russia policy

Following the dissolution of the Warsaw Pact and the Soviet Union, fears of great power competition led to the dismissal of neutrality as a viable option in Polish foreign policy which made the strategic objective of 'returning to Europe' the foundation of Poland's external strategy (Zajac, 2016, p.38). Poland aimed to pursue the 'double track' diplomacy by establishing cooperation with Russia and other newly independent former Soviet countries in eastern Europe (Zajackowski, 2017, pp.172-173; Zwolski, 2018, p.180). The country's foreign policy towards Russia between 1991 and 2004 was predominantly conducted through bilateral channels. Despite Poland's EU candidacy status after 1994, the Union played a limited role in its foreign policy until the full membership (Kaminska, 2014, p.22).

Poland's Euro-Atlantic reorientation, decision to join NATO and support for newly independent former Soviet republics remained a source of constant tensions in bilateral relations with Russia (Terry, 2000, pp.22-24). Russia's view of its former Soviet neighbourhood as the 'near abroad' and attempts to establish a sphere of influence were also obstacles to creating a stable bilateral relationship (Interview 20). A former Polish diplomat (Interview 3) highlighted a Russian saying, 'Kurica ne ptica, Polsha ne zagranitsa', which translates as 'A chicken is not a bird, Poland is not abroad', to explain Russia's strategic outlook on the former Soviet republics. This thinking was in stark contrast with Poland's vision of the common neighbourhood between the EU and Russia. Russia's discontent with Poland's Euro-Atlantic ambitions, if anything, proved that the 'double track' foreign policy would likely be ineffective (Michta, 1999, pp.46-50). While bilateral cooperation with Russia faltered (Perlez, 1993; Zieba, 2020, p.70), there was not much Russia could do to prevent Poland's NATO membership (Terry, 2000, p.24). During the accession period, Poland's foreign policy was based on not antagonising Russia. As Foreign Minister Rosati stated, 'NATO entry is our strategic goal, [which] we wish to attain in a way that does not worsen our relations with Russia' (quoted in Terry, 2000, p.42). After joining the Partnership for Peace (PfP) initiative in 1994, Poland finally became a NATO member in 1999. While the early years of Putin's presidency generated some initial optimism in bilateral relations, Poland's strategic objective of assisting former Soviet countries in realising their European ambitions stood in contrast to Russia's growing assertiveness (Cichocki, 2013, p.88; Zajac, 2016, p.90). On the eve of Poland's EU membership, the country's support of the 2003 Rose Revolution in Georgia and the Russian citizens' transit through Kaliningrad remained thorny issues in bilateral relations with Russia.

Poland's EU accession allowed Polish policy-makers to utilise the EU's influence to achieve better outcomes in bilateral dealings with Russia. Simultaneously, Poland had to make concessions and subscribe to some of the EU's common policies towards Russia, as achieving desired outcomes at the EU level was not always possible. Following the 2005 election, the new PiS (Law and Justice) government's tough stance against Russia, its goal to reduce Poland's energy dependence and open support for the Orange Revolution negatively affected Poland–Russia relations (Cichocki, 2013, p.88). In particular, the German–Russian agreement on the Nord Stream pipeline was perceived as a threat to Poland.²¹ Following the 2006 Russia–Ukraine gas dispute, the government took steps, such as developing the LNG terminal in Swinoujscie, to ensure Poland's energy security. However, Poland's position was not shared by politically and economically stronger member states, whose strategic objectives for close energy cooperation with Russia hindered comprehensive reform of the EU's energy policy (Interview 1).

The controversial aspects of economic cooperation between the countries led to the Russian embargo against Polish animal and vegetable products in 2006, which triggered the PiS government's veto of the new EU–Russia framework to replace the PCA over energy security (DW, 2006). In addition to the trade issue, Poland aimed to establish its equal position within the EU and demonstrate to Russia that it had the backing of the Union if such matters were to arise in the future (Bobinski, 2007, p.8; Kaminska, 2014, p.116). The EU eventually showed

²¹ The pipeline bypassed Poland and would allow Russia significant leverage in its political and economic relations with eastern Europe. According to President Kaczynski, the pipeline enabled Russia 'at least theoretically, the possibility of stopping gas supplies to Poland without affecting supply to the rest of Europe' (Spiegel, 2005). FM Sikorski went even further and compared the project to the Molotov–Ribbentrop pact between the Soviet Union and Germany in 1939 (The Guardian, 2006).

solidarity with Poland and expressed its support for the country's position. However, Poland was less successful in creating a new European energy security pact open to all EU and NATO members (Copsey and Pomorska, 2010, p.317; Szczerbiak, 2012, p.97). Namely, the failure to extensively discuss the energy security pact with other EU members and the government's extreme assertiveness in relations with Russia disgruntled the country's western partners (Longhurst, 2008, p.152; Spiegel, 2006; Szczerbiak, 2012, p.97), which constrained the effectiveness of Poland's Russia diplomacy at the EU level.

Following the 2007 election, the new PO (Civic Platform) government recognised that opposing the EU's political and economic cooperation with Russia would not be effective in its Eastern policy (Interview 1). It tried to demonstrate Poland as a reliable partner in the EU's relations with Russia, cement the country's position within the EU as a leading player and achieve better outcomes in foreign policy through pragmatism rather than by pushing overly enthusiastic national policies (Cichocki, 2013, p.89; Krasnodebska, 2021, p.188, 201, 202; Longhurst, 2008, p.152). By aligning with the EU's Russia strategy, particularly with that of Germany, Poland sought to advance its policy objectives towards the eastern neighbours (Interview 27; see also Czulno, 2021, pp.1256-1257; Longhurst, 2013, p.369; Zajackowski, 2017, p.178). The PO government considered close cooperation with Germany and France as a prerequisite for a successful EU strategy and worked hard to accommodate their divergent interests to achieve an effective Eastern policy (Buras, 2017, pp.4-5). Further, it advocated a common EU stance in relations with Russia over bilateral dealings, which was expected to improve the EU's position in energy policy (Szczerbiak, 2012, p.95). The government's more constructive approach led to Russia's lifting of the embargo on Polish goods, which was

reciprocated by Poland's support for the PCA in January 2008 (Kaminska, 2014, p.129), along with other positive developments in bilateral relations.²²

Russia's invasion of Georgia in August 2008 and the negotiations around installing the US missile defence in Poland represented a challenge to Poland's strategic objectives towards Russia. Despite President Kaczynski's harsh stance (Zieba, 2020, p.73), the PO government refrained from taking excessive measures.²³ Poland's position was predicated on constructive engagement and accountability and developing its Russia policy in close coordination with the EU and Germany (Cichocki, 2013, pp.90-92). Chancellor Merkel visited Warsaw before her trips to Moscow and regularly coordinated with Poland, which gave Polish diplomacy some leverage in the EU's common Russia policy by keeping the country at the centre of political processes (Interviews 24, 27). The tragic plane accident that killed President Kaczynski was followed by a period of compassion and political dialogue with Russia despite the Polish opposition's accusations against the government (Interviews 24, 27). Poland supported Russia's WTO accession and the EU's P4M, engaged in Germany's Kaliningrad Triangle initiative involving Russia and granted Russian citizens in the Kaliningrad Oblast a visa-free regime (Cichocki, 2013, p.94, 96; Czulno, 2021, p.1259; Spiegel, 2012).

²² The PM Tusk's visit to Moscow on 8 February 2008 was followed by the establishment of permanent cooperation mechanisms, such as the Committee for Polish–Russian Cooperation and the Committee for Polish–Russian Economic Cooperation, as well as the restoration of the Joint Historical Commission on Difficult Issues and Putin's recognition and condemnation of Stalin's culpability in the Katyn massacre (Bińczyk-Missala, 2016, p.113).

²³ PM Tusk highlighted Poland's outlook on relations with Russia by stating, 'We should work together with Russia; the entire EU should do that. But we should harbor no illusions concerning Russia's intentions' (Spiegel, 2009).

Russia's diplomatic and economic pressures on the EaP countries to join the ECU after mid-2013 once again were at odds with Poland's strategic objectives towards eastern Europe (see Trenin, 2013). However, pursuing pragmatic relations with Russia and supporting the EU's P4M programme and Russia's OECD membership were mentioned among the top priorities of Polish foreign policy between 2012 and 2016 (Dyner, 2020, p.194). By aligning with the EU's common policy and avoiding direct criticism of Moscow, the Tusk government aimed to realise its strategic policy objectives regarding the EaP and occupy a central position in the EU's foreign policy-making (Wisniewski, 2013).²⁴ Even after Ukraine refused to sign the AA and the Maidan protests, Poland avoided unilateral diplomacy and developed its response jointly with the EU and Germany to de-escalate tensions and limit Russian interference in Ukraine (Stratfor, 2013).

3.3.2. Poland's pre-2014 Ukraine policy

After the fall of Communism, Poland's strategic objectives towards the East was predicated on the Giedroyc doctrine (also known as the ULB doctrine), which emerged among the Polish émigré circles in the 1970s and represented a shift from Josef Pilsudski's Intermarium idea. The concept argued that Poland should accept the borders of Ukraine, Lithuania and Belarus, avoid historical grievances and establish good neighbourly relations with these countries (Zajac, 2016, pp.50-51). Thus, Poland's policy towards Ukraine has since been based on helping

²⁴ However, in April 2013, FM Sikorski defined Poland–Russia relations as 'pragmatic and brittle', warning that 'after the war between Russia and Georgia, I'm afraid conflict in Europe is imaginable' (Sikorski and Rose, 2013).

the country's democratic transformation and supporting its European ambitions (Kaminska, 2014, p.155).²⁵

A strong Ukraine anchored in the West was expected to prevent Poland's place as a front-line state or buffer zone against Russia (Terry, 2000, p.37).²⁶ The conviction among the Polish political elite that Poland's fervent support for Ukraine and strong anti-Russian stance might jeopardise the country's broader Euro-Atlantic objectives led to a relatively cautious foreign policy towards Ukraine (Szeptycki, 2016, p.62; Terry, 2000, p.22). Therefore, Poland favoured stabilising its policy towards Russia and overlooked bilateral cooperation with Ukraine in the early period of its independence (Wolczuk, 2003, pp.143-144; Zieba, 2020, pp.200-204). Ukraine's plan to create a CEE Security Area was rejected, and its attempt to join the Visegrad Triangle was met with scepticism, as the government viewed these initiatives as potential obstacles in Poland's path to the EU and NATO membership (Zajac, 2016, p.142).

Poland's growing chances of NATO accession, FM Olechowski's Eastern policy programme and Ukraine's improving image in the West after the Budapest Memorandum facilitated bilateral relations between the countries (Wolczuk, 2003, p.145). In particular, during Ukrainian President Kuchma's visit to Warsaw in June 1996, the presidents of Ukraine and Poland agreed to support each other's integration into western institutions, with President Kwasniewski's proposal leading to the signing of the Charter on the Specific Partnership between NATO and

²⁵ Poland was the first country to recognise Ukraine's independence and supported Ukraine's integration into European institutional structures such as the Council of Europe (CoE) and the Central European Initiative.

²⁶ For its part, positive relations with Poland were seen as a route to leaving Russia's sphere of influence and becoming a European state for Ukraine (Wolczuk, 2003, p.143).

Ukraine in July 1997 (Zieba, 2002, pp.206-210). Further, Polish FM Geremek voiced his support for the EU's engagement with the eastern Dimension in 1998 (Copsey and Pomorska, 2010, p.312). Despite these efforts, Poland's advocacy for Ukraine was complicated by its absence from the EU's decision-making processes (Kaminska, 2014, p.76; Wolczuk, 2003, p.146).²⁷

Poland's eventual accession to the EU enabled the country to become an outspoken supporter of Ukraine's EU integration and pursue its national policies at the EU level (Kaminska, 2014, p.78). However, Poland simultaneously had to adapt its Ukraine-first strategic objective to older member states' Russia-first objectives (Longhurst, 2008, p.4; Zajackowski, 2017, p.174). The first true challenge for Poland's Ukraine policy after its EU membership was the Orange Revolution in 2004. While older member states and the High Representative Solana were hesitant to mediate the crisis due to fears of deteriorating relations with Russia, President Kwasniewski's effective diplomacy led to deeper EU engagement in resolving it (Pifer, 2007, p.37; Youngs, 2009, p.363).²⁸

Nevertheless, Poland lacked a strategy for pursuing its Eastern policy at the EU level during the first years of its EU membership (Bińczyk-Missala, 2016, p.104; Kaminska, 2014, p.78). The EU had already designed the ENP to create a neighbourhood of a 'ring of friends' (European Commission, 2003), in which, due to the accession process, Poland could not make a substantial policy contribution. More importantly, bundling together the EU's southern and

²⁷ The 2003 non-paper from the MFA specified the EU membership of Poland's eastern partners as one of the country's primary strategic objectives (Copsey and Pomorska, 2014, p.425).

²⁸ The Kwasniewski doctrine, according to a former advisor to Putin, Pavlovsky, intended to bring Ukraine closer to Europe without Russia's participation and erect barriers between Europe and Russia (McDuff, 2005; see also Zwolski, 2018, pp.182-183).

eastern neighbours within the ENP and the absence of a membership perspective for Ukraine contrasted with Poland's efforts to promote Ukraine's EU accession (Marcinkowska, 2016, p.32; Pomorska, 2011, p.174). In the face of Ukraine's gas dispute with Russia, Poland and Ukraine signed an agreement in 2006 to cooperate in the energy sector and identified this area as one of the main components of their strategic partnership (Szeptycki, 2010, p.10). Further, Poland provided financial, technical and diplomatic support for Ukraine (Petrova, 2014, p.2), which aimed to limit Russia's influence and bring the country closer to the EU.

Poland's endeavours to renew the PCA with Ukraine and facilitate visa liberalisation between 2005 and 2007 were constrained for two reasons. First, after 2004, the EU was experiencing enlargement fatigue, and member states had little appetite to grant Ukraine and other potential candidates a membership perspective (Interview 2; see also Cianciara, 2008, p.8). Second, the PiS government's distrust towards Germany, its assertive EU-level diplomacy and hawkish Russia policy limited Poland's position to influence the EU's Eastern policy (Cianciara, 2008, pp.8-9; Longhurst, 2008, p.150). However, changing circumstances enabled the country to pursue its Eastern policy more effectively through the EU.²⁹ First, the Commission's 2007 Communication underlined the future differentiation of the ENP's geographical dimensions (European Commission, 2007). Second, the PO government adopted a more EU-oriented foreign policy after winning the parliamentary election in October 2007 (Cianciara, 2008, p.10; Kaminska, 2014, p.175). Similar to its Russia policy, the new government prioritised using EU

²⁹ It should be noted that despite the government change, Poland's overarching policy preferences regarding the Eastern policy did not change. Differences between the PiS and PO governments were over policy styles and how to better achieve Poland's foreign policy objectives. Thus, previous governments were not less enthusiastic about advocating close EU cooperation with Ukraine (see Copsey and Pomorska, 2014, pp.4-6).

channels to support democracy in Ukraine and help the country foster closer relations with the EU (Kucharczyk and Fuksiewicz, 2015, p.105). The Tusk government intensified cooperation with other EU partners and specifically Germany to garner their support for its strategic objectives and the Eastern policy (Copsey and Pomorska, 2010, p.313; Czulno, 2023, pp.23-25; Toro, Butler and Gruber, 2014, p.373). Consequently, the EaP emerged as a Polish–Swedish joint proposal and demonstrated the success of Poland’s diplomatic efforts (Council of the EU, 2009; Vogel, 2008). It was an essential instrument for Poland’s step-by-step approach aimed at eventually bringing Ukraine into the EU in the mid-term, even though the initiative did not offer a clear membership perspective (Pomorska, 2011, p.177; Szczerbiak, 2012, p.89; Zurawski vel Grajewski, 2010, p.37).

Poland’s advocacy of Ukraine’s EU ambitions was crucial in the negotiations of the AA between the EU and Ukraine in 2011, which was postponed by the EU due to the imprisonment of the former Ukrainian PM Tymoshenko. Despite the worsening of EU–Ukraine relations during Yanukovych’s presidency, Poland was adamant about finalising the deal with Ukraine (Szeptycki, 2016, p.74). The majority of the EU countries, particularly Germany, favoured a conditional approach and were hesitant to approve the agreement without tangible reforms,³⁰ while member states such as Poland, Lithuania and Estonia wanted to proceed with the AA without democratic and judicial reforms in Ukraine (Potocka, 2013; RFE/RL, 2012). Poland’s close cooperation with Germany and the understanding among German policy-makers that failure to sign the agreement might push Ukraine into Russia’s sphere of influence brought the

³⁰ The EP’s Cox–Kwasniewski mission in 2012–2013 intended to achieve the release of Tymoshenko before finalising the AA (Nitoiu and Sus, 2017).

EU's final position in line with Poland's strategic objectives (Czulno, 2023, pp.31-32). Consequently, despite the absence of a membership perspective in the AA, Poland's consistent efforts kept the deal on the EU agenda and paved the way for Ukraine's western-oriented political transition.

Country	Period	Strategic policy objectives
Russia	1990s–2004	Achieve the EU and NATO accession while avoiding confrontation with Russia
	2004–2014	Promote a tougher EU common policy towards Russia through assertive EU-level diplomacy (under PiS), pragmatic cooperation coordinated with the EU and particularly Germany (under PO).
Ukraine	1990s–2004	Provide strategic but cautious support for Ukraine's western integration to enhance Poland's security and facilitate its own EU and NATO accession.
	2004–2014	Promote Ukraine's deeper cooperation with the West through intensified bilateral engagement and EU-level initiatives, such as the EaP and the AA.

TABLE 3. Poland's strategic policy objectives regarding Russia and Ukraine pre–2014

3.4. Summary

The EU intended to establish cooperative relations with Russia after the dissolution of the Soviet Union, which was sometimes defined as a Russia-first policy and predominantly driven by western member states' political and economic interests. Member states, such as Germany, France and Italy, were determined to continue strategic cooperation with Russia in areas of mutual interest despite the Russia–Ukraine gas disputes of 2006 and 2009 and Russia's invasion of Georgia in 2008, ignoring the warnings of the eastern states, such as Lithuania and

Poland, about Russia's growing assertiveness. It meant that the EU's common Ukraine policy was largely conducted in the shadow of its Russia policy from the 1990s until 2014. While bilateral contacts were established and cooperation was institutionalised with the launch of the ENP and the EaP, there was no consensus among member states to grant Ukraine a membership perspective. Therefore, it was not until the 2014 Ukraine crisis that the EU's Russia and Ukraine policies underwent considerable changes.

Hungary's foreign policy towards Russia was limited to the economic sphere in the 1990s. While bilateral relations reached their lowest point during the first Orban government, successive Hungarian governments maintained a pragmatic approach to Russia following PM Medgyessy's reset of bilateral relations in 2002. The EU membership did not considerably restrict Hungary's independent Russia policy, and Hungary did not make much effort to promote its strategic policy objectives within the EU, instead opting to improve bilateral ties with the country through the Eastern Opening strategy following 2010. In the end, despite growing energy partnership with Russia, Hungary's and the EU's foreign policies towards Russia did not demonstrate significant divergences before the 2014 crisis. In relation to Ukraine, Hungary's relations with the country after regaining its full sovereignty were driven by the objective of protecting the rights of the ethnic Hungarians living in Ukraine. In this sense, respective Hungarian governments mainly focused on this issue and did not establish a specific Eastern or Ukrainian dimension in Hungary's foreign policy. The country's EU membership enabled it to pursue a more active policy towards Ukraine, with the Gyurcsany government contributing to the EaP through consultations within the V4 and EU. During PM Orban's second term, Hungary remained committed to cooperating with Ukraine through bilateral and EU

channels despite its failure to include special clauses regarding minority rights in the AA with Ukraine. Thus, the government's Ukraine policy did not defy the EU's common line and could be characterised by a degree of continuity before the 2014 crisis.

After regaining its full sovereignty, Poland struggled to build a stable relationship with Russia due to Moscow's discontent over Poland's NATO and EU accession and conflicting views on the Eastern neighbourhood. Poland's EU accession meant that bilateral relations could no longer be handled separately from the EU's common Russia policy. The Tusk government's EU-oriented policy adapted Poland's foreign policy towards Russia to the EU mainstream and stabilised relations between the countries. However, despite different Polish governments' varying policy styles and the EU's common Russia policy, underlying differences over broader geopolitical issues and Russia's growing assertiveness remained constant features of Poland's relations with Russia. Regarding Ukraine, establishing good relations and helping the country realise its European ambitions were among the main priorities of Poland's independent foreign policy. Regardless of the government in charge, Poland was the leading proponent of Ukraine within the EU. The country invoked the EU mediation during the Orange Revolution, formulated the EaP with Sweden and pushed for the AA to bring Ukraine closer to the EU. Concurrently, Poland had to adapt its Ukraine-first policy to the Russia-oriented Eastern strategies of the western member states in order to effectively promote its strategic objectives within the EU. While this required some concessions, such as agreeing to the absence of a membership perspective for Ukraine in the AA, Poland consolidated its position as Ukraine's main supporter within the EU before the 2014 crisis.

4. EU-LEVEL FOREIGN POLICY INITIATIVES TOWARDS RUSSIA AND UKRAINE

This chapter examines EU-level foreign policy initiatives towards Russia and Ukraine between 2014 and June 2024. It begins with Russia, as Section 4.1.1. analyses the EU's common position towards the country in the light of divergences among member states during the 2014–February 2022 period, while Section 4.1.2. investigates the EU's more resolute foreign policy following Russia's full-scale invasion of Ukraine. The second section focuses on Ukraine, with Section 4.2.1. discussing the upgrade in the EU's cooperation with the country during the 2014–February 2022 period and Section 4.2.2. presenting the Union's support for Ukraine for as long as it takes after Russia's full-scale invasion.

Beyond providing an overview of the EU's evolving foreign policy towards Russia and Ukraine, this chapter serves an analytical purpose within the theoretical framework developed in Chapter 2. By reconstructing the content, scope and evolution of EU-level foreign policy initiatives, it identifies an EU-level independent variable against which the Europeanisation of Hungary's and Poland's foreign policies are examined in the next two chapters. The chapter therefore does not assess Europeanisation outcomes directly but establishes the conditions under which different national strategies and mechanisms of change may emerge. By distinguishing between periods of relatively weak coordination (2014–February 2022) and more resolute common EU action (February 2022–June 2024), it also highlights variation in EU-level pressures, which are central to explaining differences in national responses across time and cases. In doing so, the chapter provides the empirical foundation for tracing causal processes linking EU-level initiatives to national foreign policy change in Chapters 5 and 6.

4.1. EU-level policy initiatives towards Russia

4.1.1. Striking a balance amid varying member state interests (2014–February 2022)

Russia's annexation of Crimea and support for armed separatists in eastern Ukraine changed the EU's perception of the country. As was articulated by HR/VP Mogherini in September 2014, relations with Russia based on a strategic partnership could no longer be sustained (Euractiv, 2014). The Ukraine crisis revealed the underlying challenges in relations and represented a culmination point of long-term differences between the two sides (Casier, 2016; Haukkala, 2015, 2016). The EU's common foreign policy towards Russia was led by France and Germany, striking a balance between the preferences of hawkish and dovish member states. Therefore, despite imposing economic sanctions on Russia, linking any substantial change in relations to the implementation of the Minsk agreements and taking steps regarding energy security, the EU also selectively engaged with the country in areas of mutual interest. This reflected the EU's largely consensus-based and intergovernmental foreign policy, which hindered more decisive action due to the enduring differences in member states' Russia policies. 'Some part of the business went on as usual, which stopped in 2022', highlighted a senior EU diplomat (Interview 7), underlining, 'So, you have to distinguish between 2014 and 2022 and after 2022. There was unity but on a lower scale of EU action towards Russia, and after 2022, obviously unity on a higher scale'. Thus, in retrospect, the EU's Russia policy between 2014 and February 2022 was less resolute than in the period following February 2022 and showed elements of continuity with the pre-2014 period.

Early diplomatic response and sanctions

It might have been expected that the intergovernmental nature of the CFSP, persistent divergences in member states' Russia policies (Orenstein and Kelemen, 2017; Schmidt-Felzmann, 2022, p.207; Thaler, 2020, p.1) and their preferences for bilateralism in relations with Russia (David, Gower and Haukkala, 2013, p.2; Natorski and Pomorska, 2017, p.59; Schmidt-Felzmann, 2014, p.44) would prevent the EU's common response to the Ukraine crisis. While divergences among member states over the appropriate EU strategy persisted, they set aside their differences to agree on the core elements of the EU's Russia policy following February 2014. Two schools of thought were present within the EU at the time. Proponents of the first school, 'who are silent nowadays', advocated more engagement with Russia and 'catering to its perceptions' (Interview 2; see also Youngs, 2017, pp.92-98). Supporters of the second school, 'who nowadays argue that the EU should have done more', wanted more assertive action (Interview 2). The EU's official policy line sought to balance the two approaches but mainly reflected the preferences of the first school. A senior EU diplomat (Interview 2) summarised the period between 2014 and February 2022:

The two biggest member states, France and Germany, got a ceasefire with some constructive ambiguity in the agreement and worked with that to solve the problem. You may say that the problem didn't have a solution, or Putin wasn't interested in the solution ... So, I think that's the biggest reason why what we did didn't work, but I'm not sure what we could have done better.

After the initial incoherence in responding to the Maidan Revolution (Howorth, 2017, p.128), the EU started to take more decisive measures against Russia. The EU's Russia policy was based on adopting restrictive measures, engaging in diplomatic dialogue to restore Ukraine's territorial integrity and enhancing the energy security of member states (Interviews 2, 11).

Simultaneously, communication lines with Russia were kept open to prevent large-scale escalation in the hope that constructive engagement might be possible (Interviews 6, 11; see also Cross and Karolewski, 2017, p.3).

The EU limited its diplomatic relations with Russia in the early days of the crisis. It suspended the preparations for the G8 summit in Sochi, negotiations for a visa deal and a new agreement to replace the PCA (European Council, 2014a; Council of the EU, 2014a). Following Russia's official annexation of Crimea on 17 March, member states cancelled an upcoming EU–Russia summit, suspended regular bilateral summits between member states and Russia, imposed asset freezes and travel bans on Russian officials and banned imported goods from Crimea (European Council, 2014b). However, these measures were largely symbolic and had little influence on Russia's foreign policy. Differences among member states' positions complicated the EU's efforts to adopt stricter sanctions. In this context, the Baltic States, Poland, the UK and Sweden favoured stronger EU action, while countries such as Austria, France, Germany, Italy and Spain were cautious about damaging relations with Russia (Howorth, 2017, p.131; Macfarlane and Menon, 2014, p.100; Pridham, 2014, p.59; Sjursen and Rosen, 2017, pp.27-29). It was not until the downing of the Malaysian Airlines flight MH17 by Russian-backed separatists on 17 July 2014 that the EU and member states revised their perceptions of the crisis, including Russia's role in the conflict. Neil Crompton, the then Deputy Political Director at the Foreign and Commonwealth Office (FCO), noted that the event 'very much changed the politics of Russia within European Governments' (quoted in House of Lords, 2015, p.61). The tragedy also paved the way for tougher measures and targeted economic sanctions against Russia (Interview 11). A senior EU diplomat (Interview 2) put it very bluntly:

As I would tell anyone, in 2014, the package of sanctions we had, I still think to this day that would not have been approved had Russia not shut down the MH17 plane. As crude as it may sound, blood leads foreign policy to some extent. If you have blood, then it's serious, it reaches the media, and then it reaches public opinion, and then it reaches politicians.

France's and Germany's eagerness to proceed with sanctions at the potential cost of the impact on their economies and consensus-building efforts helped the EU achieve a common sanctions policy after the MH17 tragedy (Juncos and Pomorska, 2021, p.563; Orenstein and Kelemen, 2017, p.98; Raik, Helwig and Jokela, 2014, p.3; Schmidt-Felzmann, 2014, p.50). Nevertheless, member state governments' definition of their strategic policy objectives was the most decisive factor in determining their motivations for subscribing to sanctions. In this sense, historical factors, economic relations, national security considerations and threat perceptions played varying roles (Interview 2, 5). A senior EU diplomat (Interview 11) noted: 'If a country considers that some decision goes against their national security and economic interests, if they suffer from big losses as compared to others, they'll never do it [agree to EU policies]'. Thus, the governments in the Baltic States and Poland had different strategic objectives and motivations to support sanctions than those in countries such as Greece, Hungary and Italy. The former group backed sanctions because they largely aligned with their foreign and security policy preferences. For its part, the latter group agreed to them after bargaining or because they did not threaten their immediate economic interests (Interview 12; see also David 2016, p.36; Orenstein and Kelemen, 2017, pp.97-98; Youngs, 2017, pp.69-72).

Consequently, Russia's continued violations of international law and the MH17 tragedy put pressure on member states and led to the adoption of economic sanctions after the 29 July

Council meeting. They were intended not to punish Russia but to raise the cost of supporting the conflict for the country (Interview 2). Restrictive measures targeted Russia's banking sector, limited its access to the EU capital markets, imposed an embargo on the import and export of arms and prohibited exports of dual-use goods by EU member states (Council of the EU, 2014b). Sanctions were further strengthened on 11 September 2014 by blocking five Russian state-owned banks' access to EU loans and limiting services to Russia's deep-water oil exploration and production industries (Council of the EU, 2014c). Despite discussions over their effectiveness and capacity to influence Russia's behaviour (Byrne, 2017; Mikhelidze and Tocci, 2018; Vara, 2014), sanctions were extended and complemented by adding new individuals and companies to the list.

Franco-German diplomatic dominance

The EU's diplomatic endeavours to engage Russia and resolve the conflict in Ukraine were spearheaded by member states. Initially, the Weimar Triangle, which was at the forefront during the Maidan Revolution, attempted to mediate between Russia and Ukraine. Subsequently, the Geneva talks involving the EU, the US, Ukraine and Russia were held to address the escalating crisis in eastern Ukraine. However, following Putin's remarks regarding the infeasibility of the talks (Luhn, 2014), the Normandy Format consisting of France, Germany, Russia and Ukraine became the only working mechanism for mediating between the sides.³¹ Although France and Germany acted outside the EU's institutional structure, their diplomacy

³¹ The idea came from Germany during the 70th anniversary of D-Day. However, as the German government did not want to act alone, France volunteered to join, and the two countries oversaw the negotiation process (Interview 11).

relied on intra-EU support and tacit approval of member states (Alcaro and Siddi, 2021, pp.154-161). The two countries briefed other member states before and after every meeting, but ultimately, EU institutions had no significant involvement in the content of the talks (Interview 6). It was up to Germany and France to follow up on certain proposals (Interview 6, 11), which sometimes led to dissatisfaction among the European External Action Service (EEAS) officials, who preferred the EU's direct involvement (Youngs, 2017, p.140). In the words of a senior EU diplomat (Interview 18), 'It was not well-prepared, well-planned and kind of a spontaneous process'.

Reactions within the EU to the process varied. While the hawks, such as the Baltic States and Poland, considered it appeasement, the countries in the periphery and those dependent on Russian energy supplies mainly supported the talks and did not favour a strong policy line against Russia (Interview 7). Although the German position that 'if the war had not stopped in 2014, Ukraine would have been eliminated within a couple of days' prevailed (Interview 7; see also Hildebrandt and di Lorenzo, 2022), France and Germany sought to strike a balance between the more assertive Russia policies of the hawkish member states, such as Poland and the Baltic States, and the more accommodating preferences of the dovish member states, such as Greece, Hungary and Italy (Interviews 2, 18; Lovato, 2024, p.981; Nitoiu, 2016, p.379). Successive talks between the sides during the summer of 2014 with the mediation of the Organisation for Security and Cooperation in Europe (OSCE) and the Normandy Format led to the Minsk Protocol on 5 September 2014 (BBC, 2014). However, due to increased hostilities in eastern Ukraine, the Minsk II had to be agreed on 12 February 2015. It stipulated, inter alia,

an immediate and comprehensive ceasefire, the withdrawal of heavy weapons from the contact line and constitutional reform in Ukraine (FT, 2015; OSCE, 2015; UN, 2015).

The new geopolitical environment required a revised EU approach towards Russia. Even before the second Minsk agreement, HR/VP Mogherini had presented an Issue Paper on the EU's short- to medium-term strategic relations with Russia to the FAC (European Council, 2015a). It formed the basis of the 19 March 2015 March Council meeting, where member states agreed that restrictive measures would remain in place until Russia's full implementation of the Minsk agreements (European Council, 2015b). In this way, the complete normalisation of the EU–Russia relations was conditioned upon Russia's fulfilment of the twelve-point ceasefire deal. In March 2016, EU foreign ministers agreed to HR/VP Mogherini's Five Guiding Principles of the EU's relations with Russia. They included Russia's full implementation of the Minsk agreements, improving the EU's relations with former Soviet countries in Russia's neighbourhood, enhancing the EU's resilience against Russian threats, selective engagement with Russia on areas of common interest and people-to-people contacts with Russian civil society (European Parliament, 2016). Further, the EU's 2016 Global Strategy defined Russia as a key strategic challenge but underlined principled pragmatism as a guide for the EU's external relations, noting the engagement with the country in areas of mutual interest (EEAS, 2016b, p.33). One senior EU diplomat (Interview 11) summarised the Union's Russia policy at the time:

We had no illusions about Russia as such ... It was a bit of carrots and sticks. On one hand, we continued to have a dialogue in areas which were not politicised, such as energy and culture, while at the same time, we were ready for more sanctions if need be against Russian players who were responsible for the situation in Ukraine.

Following 2014, the EU's official documents and discourse gradually degraded relations with Russia from a strategic partner to a strategic patience to a strategic challenge (EEAS, 2016b, p.33; Schmidt-Felzmann, 2016). However, the EU's Russia policy, based on a two-track approach, also represented a compromise between the hawkish and dovish states' preferences (see the previous section). The countries with deep economic ties with Russia held significant influence and were reluctant to completely abandon their Russia-first policies towards the East. For instance, one EU diplomat (Interview 11) remarked that Germany's automatic reflex regarding the developments in the East had always been driven by the thinking of 'What would Russians say in reaction or whether they accept this policy'. While this thinking gradually eroded following 2014, it only fully ended in 2022 (Interview 11). Most EU members refused to antagonise Russia and wanted to maintain dialogue with the country without accepting its claims of a sphere of influence in the Eastern neighbourhood (Youngs, 2017, pp.92-98). One former Polish diplomat (Interview 24) noted: 'If the romantic period was no longer there, the realistic period did not arrive straight away ... So, Angela Merkel was condemning Russia's actions, while at the same time was playing dumb essentially, and that translated into the EU policy'.

The EU's expectations that Russia implement the Minsk agreements before a return to business as usual remained unchanged in the following years. It was also evident that Russia under Putin would not take any measures to improve the state of democracy and human rights in the country (Interview 11). Bilateral relations steadily deteriorated, inter alia, due to the Skripal poisoning in the UK and the capturing of Ukrainian vessels in the Kerch Strait in 2018 (Interviews 3, 6, 11). Further, developments such as the poisoning of Navalny and support for

Lukashenko's crackdown following the Belarus election in August 2020 sent negative signals about Russia's foreign policy objectives and indicated that its relations with the EU would take an even more negative turn (Interviews 2, 3, 11). The culmination point was HR/VP Borrell's trip to Moscow on 5 February 2021, where it became clear that the two sides could not agree on the very basics of the relationship, and normalisation in relations was unattainable (Interview 6). Upon his return, HR/VP Borrell emphasised that Russia did not want to have a constructive dialogue with the EU, and the country 'is progressively disconnecting itself from Europe and looking at democratic values as an existential threat' (EEAS, 2021).

Due to changing circumstances, HR/VP Borrell presented the EU's new Russia strategy upon the request of member states on 16 June 2021. The strategy outlined the three key components of the EU's Russia policy: push back, constrain and engage (European Commission, 2021a). While maintaining a commitment to the Five Guiding Principles and being open to selective engagement, the document mentioned that Russia's actions had created 'a negative spiral' and warned of 'a further downturn' in relations. It also stated that member states should not conduct their bilateral relations with Russia to the detriment of the EU's interests and goals (European Commission, 2021a, p.11). A few weeks later, the EU Council conclusions on 24–25 June 2021 reiterated the new strategy's main aspects, urged Russia to demonstrate more constructive engagement and underlined the necessity of a firm and coordinated response by the EU and member states against Russia's aggressive actions (European Council 2021a, p.6). The position was taken in the face of traditional division lines within the EU. Namely, while Chancellor Merkel and President Macron resisted tougher action, aimed to adopt a new carrot and stick approach and organise a summit between EU leaders

and President Putin, the Baltic States and Poland advocated a decisive EU position (Henley, 2021; Herszenhorn et al., 2021). Despite the EU reiterating its readiness for selective engagement with Russia, the Council meeting marked a victory for member states advocating a resolute stance against France's and Germany's attempts to reset relations with Russia without any change in its foreign policy (Herszenhorn and Barigazzi, 2021). Eventually, while the EU managed to present a common position, differences among member states' policy preferences persisted until Russia's full-scale invasion of Ukraine.

Lack of tangible action in energy security

The ambiguity of the EU's foreign policy and selective engagement with Russia in non-politicised areas prevented the EU from deploying its influence in the energy area. Admittedly, the Union took some steps to address its energy dependence following the crisis. The Council meeting on 20–21 March 2014 underlined support for the most gas-dependent countries' efforts to reduce their dependencies (European Council, 2014b). The Commission was tasked with developing a strategy for energy security and, in May 2014, introduced the European Energy Security Strategy, highlighting eight key areas aimed at reducing the EU's vulnerability to external energy disruptions. The strategy identified the strong dependence on a single external supplier as the most crucial energy security problem for the EU and member states and called for 'a hard-headed' energy security strategy to increase the EU's resilience against external shocks and disruption in energy supplies (European Commission, 2014, p.2). The 2014 Strategy was reinforced by the Energy Union Package in February 2015, which reiterated the necessity of diversifying energy sources, supplies and transit routes and underlined the

importance of cooperation among member states to mitigate potential supply crises (European Commission, 2015, pp.4-7).

Despite these measures, the EU refrained from imposing sanctions on Russian energy exports and geopoliticising its energy relations with Russia. This enabled some member states to maintain their energy cooperation with Russia separate from political confrontation with the country. Namely, despite Poland's push to prioritise energy diversification in the EU's crisis response, Energy Commissioner Gunther Oettinger argued that it could not become a priority (Youngs, 2017, p.107). While some member states, such as the Baltic countries and Poland, strived to reduce their dependencies on Russia, others, such as Germany, did not follow this trend (Interview 11). In this context, the CEE countries were particularly successful in increasing pipeline connectivity by establishing reverse gas flows, aimed at minimising their isolation in the event of a future disruption in Russian gas exports (Harrison and Princova, 2015). For its part, Germany reached an agreement with Gazprom for the construction of the Nord Stream 2 pipeline from Russia in 2015. Despite the appeals from the nine CEE states to the Commission (Sytas, 2016; see also Fischer, 2016), the amendment to the EU's Gas Directive granted Germany a formal right to regulate the pipeline (Schmidt-Felzmann, 2019, p.158).

The episode generated scepticism in the Baltic States and Poland about the Union's common approach to Russia. One former senior Polish diplomat (Interview 1) criticised the ineffectiveness of the Franco-German-led Normandy Format and emphasised that the EU's energy relations, particularly the Nord Stream pipelines, could have been used to pressure

Russia into making concessions on Ukraine.³² These divergences prevented the EU from incorporating energy within its broader diplomatic efforts towards Russia. The preferences of countries with a longstanding history of commercial and energy relationship with Russia (see Siddi, 2019, p.557) led to the economic approach to energy and the inclusion of a selective engagement provision in the EU's official documents.³³ Thus, the EU generally failed to establish a unified strategy for energy security and meet its objectives to reduce reliance on Russian energy between 2014 and February 2022.

4.1.2. Radical change after the full-scale invasion of Ukraine (February 2022–June 2024)

The EU was more prepared before Russia's full-scale invasion of Ukraine in February 2022, and its response was much more resolute, coordinated and comprehensive compared to 2014. There was no room for meaningful diplomacy until Russia entirely withdrew its troops from Ukraine, and the Normandy Format, Minsk agreements and EU's pre-February 2022 policies became completely inoperative. While France and Germany still remained important players in EU foreign policy-making, their influence was significantly reduced after their failure to diplomatically contain Russia. In the absence of diplomacy, imposing sanctions and decoupling from Russian hydrocarbons became the main elements of the EU's common Russia policy. Despite some differences among member states' positions, the EU adopted an unprecedented

³² The diplomat (Interview 1) also noted that it was only due to Ukraine's position that the Franco-German leadership was unable to completely freeze the conflict.

³³ Despite the Union's endeavours to reduce energy dependence, Russia's gas exports to Europe reached new heights in 2018 (Siddi, 2018, p.3).

fourteen sanctions packages against Russia and shifted its previous approach of keeping energy relations outside of political confrontation with Russia.

EU diplomacy and its changing perception of Russia

The EU did not dismiss the US intelligence in the autumn of 2021 regarding Russia's intentions to invade Ukraine, and the Council meeting in December 2021 warned Russia about massive consequences and restrictive measures in case of further aggression against Ukraine (European Council, 2021c; Nardelli, Jacobs and Wadhams, 2021).³⁴ There were discussions within the EU on whether to publish the list of potential sanctions and force Russia to de-escalate, and the Commission President von der Leyen shared some details of potential sanctions on 3 February 2022 (Interview 2; Lynch and Vela, 2022b). However, the EU's diplomatic efforts and President Macron's and Chancellor Scholz's visits to Moscow did not yield any solutions on the eve of Russia's invasion of Ukraine.

Russia's full-scale invasion generated a 'geopolitical awakening' in the EU (Borrell, 2022a, 2022b). In contrast to the 2014 crisis, where France and Germany took the lead in EU diplomacy, Russia's full-scale invasion in 2022 generated a leaderless unity within the Union (Liik, 2022; see also Maurer, Whitman and Wright, 2023, pp.234-236). Notably, Russia's aggression vindicated the fears of states advocating a more assertive EU stance against the country. As the Commission President von der Leyen emphasised in her State of the Union

³⁴ Some member state diplomats initially dismissed it as American propaganda, while several EU officials questioned whether it would be logical for Russia, considering the main threat to the country was China (Interview 2).

speech in September 2022, ‘We should have listened to the voices inside our Union – in Poland, in the Baltics, and all across Central and Eastern Europe’ (European Commission, 2022a). The full-scale invasion also altered the threat perceptions of the old member states that had previously adopted a pragmatic policy towards Russia. German Chancellor Scholz’s Zeitenwende speech heralded a new era in the country’s approach to security and defence (The Federal Government of Germany, 2022). Germany’s first-ever National Security Strategy defined Russia as ‘the greatest threat to peace and security in the Euro-Atlantic area’ (Chazan and Pitel, 2023). Further, the EU’s response developed incrementally, as even diplomats from countries such as Ireland were saying, ‘We cannot tolerate this, we cannot accept this, let’s do something. And then Bucha comes, let’s do a lot more’ (Interview 2).

The brutality of Russia’s invasion brought member states together around the core elements of the EU’s response despite their differing views on how to best achieve it. A senior EU diplomat (Interview 11) stated: ‘In a war situation, you need coordination, and it was fairly easy that member states basically listened to us’. The EU increased diplomatic, political and economic pressure on Russia to end its invasion. One of the tenets of the EU’s diplomacy was isolating Russia within international organisations (Barigazzi, 2022; Interview 11). In this context, the United Nations General Assembly (UNGA) condemned Russia’s invasion of Ukraine and called for the withdrawal of Russian forces from the country on 2 March 2022. Due to the efforts of EU countries, Russia was expelled from the UN Human Rights Council (HRC). EU diplomacy also included coordination with other international partners, including the G7 states, as well as diplomatic endeavours to persuade the Global South and neutral states to condemn Russia and align with the EU’s sanctions policy (Helwig, 2023, pp.62-63).

Referring to the OSCE sessions, where some limited contacts were still possible, a senior EU diplomat (Interview 11) highlighted:

Nowadays, it has little to do with diplomacy. They are speaking loud and clear and accusing each other up to personal insults and whatever you want. Russia had kept here and there certain decency in their approaches until 2014, but since then, we have this saying, 'If the reputation is ruined, then nobody bothers anymore'.

Several EU diplomats (Interviews 5, 6, 11) noted that the primary element of the EU's common Russia policy became its support for Ukraine, which constituted a wartime policy to bolster Ukraine's capacity to defend itself against Russian aggression. An informal meeting of the Heads of State or Government in Versailles on 10–11 March 2022 presented a roadmap of the EU's response to Russian aggression and changing geopolitical realities. One of the three dimensions³⁵ of the EU action was identified as the reduction of its energy dependence, particularly by phasing out reliance on Russian gas, oil and coal as soon as possible (European Council, 2022a, p.5; see also European Council, 2022b).

Some individual member state leaders, notably President Macron and Chancellor Scholz, tried to keep communication lines open with Russia and convince it to stop the aggression (Cohen, 2022a; France24, 2022). The French President also attempted to have his own touch on the EU's Russia strategy by first stating that 'We must not humiliate Russia' and then proposing to give Russia security guarantees (Cohen, 2022b; France24, 2022). These remarks angered Ukraine, the Baltic States and some CEE countries, and President Macron then adopted 'strategic humility' to appeal to the hawkish countries and garner their support within the EU (Abboud, 2023; Euractiv, 2022b). Concurrently, member states such as Hungary and Slovakia

³⁵ The other two dimensions of the EU's roadmap were increasing defence capabilities and developing a more robust economic base.

intended to maintain relations with Russia due to economic reasons and held high-level meetings with Russian officials on various occasions (Rettman, 2023b; Vinocur et al., 2023). While these endeavours did not seriously affect the EU's common Russia policy, introducing a new EU strategy on Russia proved tremendously difficult due to the unpredictable nature of the conflict and disagreements among member states (see Barigazzi, 2022).

Sanctions policy amid divergences among member states

The scale of the Russian invasion put enormous pressure on member states to react, and inaction was not an option for the EU. The Commission first scanned different sectors in the preparation phase of sanctions, received feedback from member states about their potential impact and facilitated Transatlantic coordination (Interview 2; Hakansson, 2023, pp.8-9; Lynch, 2022a; see also Anghel and Jones, 2023, p.774; Korkea-Aho and Lonardo, 2025; Portela, 2024). The process was not improvised; it was very fast and based on previous preparatory steps and the EU's 2014 experience (Interview 2). The purpose of sanctions was to incite change in Russia's policy, limit its ability to wage war and raise the costs of armed aggression against Ukraine by putting pressure on its economy (Interviews 2, 5, 6, 7). A senior EU diplomat (Interview 2) noted that the Commission examined the pros and cons of sanctions for the EU interests and economy, considered all possible sectors and ensured that they were effective and did not disrupt the world economy. As one EU diplomat (Interview 5) remarked, sanctions were not adopted to blindly punish Russia:

There's also a clear understanding, which is shared by all, that sanctions should and must hurt Russia more than us because, otherwise, there's no sense in having them,

which is also why there isn't yet any agreement on sanctions, for example, on the nuclear industry. If there's a cost-benefit analysis, it's clearly that.

The Union reached a consensus among member states' different preferences regarding how to proceed with sanctions. Namely, while the step-by-step approach represented the position of the rear-guard states such as France, Germany and the Netherlands, the content of the early packages reflected the position of more hawkish frontline states such as the Baltic States and Poland³⁶ (Olsen, 2022, p.12, 32). The adoption of sanctions followed a swift and incremental pattern in the early months of the war.³⁷ On-the-ground developments rendered sceptical member states' positions untenable and reduced their resistance to proposals presented by the Commission (Interview 2). Decision-making was also expedited by avoiding standard procedures, as the Council Working Groups and RELEX discussions were bypassed, and decisions were made at the COREPER II and rubber-stamped at the FAC (Hakansson, 2023, p.8; Korkea-Aho and Lonardo, 2025, p.14; Olsen, 2022, p.34). A senior EU diplomat (Interview 2) underlined increased cooperation after February 2022:

If you had told me at the time when we had that proposal in the drawer waiting for when Russia invaded that we were going to adopt the twelve subsequent sanctions packages, I would have told you that that wasn't possible from a technical, legal and political point of view. I would've said that the Commission would not be able to do this, and member states would've never approved it.

The initial four packages were adopted in less than three weeks. The first package was adopted in reaction to Russia's recognition of Donetsk and Luhansk oblasts as independent entities.³⁸

³⁶ After February 2022, differences between the hawkish and other member states' positions were more related to the means rather than the ends. Thus, the term here refers to the variation in tactics rather than strategies in member states' Russia policies.

³⁷ While the content largely demonstrated the hawkish states' preferences, they could not achieve their maximalist goals regarding some details of the sanctions' content. For instance, contrary to their positions, the EU did not exclude all Russian banks from SWIFT.

³⁸ It was limited in scope, as member states gave Putin a chance to save face in case he refrained from invasion (Vela and Lynch, 2022a).

It targeted Russian Duma officials, restricted economic relations with these oblasts and banned Russia's access to the EU's capital and financial markets and services (Council of the EU, 2022a). However, as Russia's aggression worsened, areas that seemed inconceivable to sanction started to be targeted. The second and third packages involved asset freezes for Putin and Lavrov, a ban on Russian aircraft from EU airspace, the freeze of Russian central bank assets in the EU, the prohibition of all transactions with Russia's central bank, the exclusion of seven Russian banks from SWIFT and the suspension of RT and Sputnik in the EU (Baczynska and Siebold, 2022; Nolsoe and Pop, 2022). Further, the fourth package prohibited all transactions with Russia's certain state-owned enterprises, credit rating services and new investments in Russia's energy sector and added iron, steel and luxury goods to the sanctions list (Council of the EU, 2022b). Due to the devastation of Russia's invasion, even the countries with close bilateral relations with Russia did not express much resistance to the EU's early measures. In this sense, Germany suspended the Nord Stream project even before the full-scale invasion began and dropped its opposition to the SWIFT ban (Marsh and Chambers, 2022; Sevastopulo et al., 2022), and Hungary did not threaten to veto the first cluster of sanctions and unequivocally condemned Russia's aggression (Szakacs, 2022). Russia's invasion also changed member states' urgency and perceptions of sanctions, as a senior EU diplomat (Interview 2) stated: 'There was a package [the fifth] that would not have been adopted without Bucha'. The package banned the import of coal, other solid fuels, wood, cement, seafood and liquor, prohibited Russian and Belarusian road transport operators from entering the EU and Russian vessels from accessing EU ports and stopped the export of jet fuel to Russia (Council of the EU, 2022c).

Eliminating energy dependence on Russia

After the initial phase of sanctions, discussions shifted to targeting imports of Russian fossil fuels, a subject that remained contentious among member states. The Baltic States' and Poland's tougher stances were met with scepticism in Germany, with one EU diplomat noting, 'Throwing out everything on the table now will damage the diplomatic process' (anonymous diplomat quoted in Moens, Barigazzi and Lynch, 2022). Considering some member countries' energy dependence on Russia, they faced the dilemma of responding to Russian aggression or prioritising national interests by ensuring continued access to Russian gas and oil. In particular, Germany was cautious about banning the imports of Russian gas due to the difficulty of replacing the pipeline infrastructure and diversifying supplies (BBC, 2022a; Bennhold, 2022; Connolly and Wintour, 2022). However, Russia's demand to be paid in rubles for its gas contracts with 'unfriendly countries' changed the situation. A senior EU diplomat (Interview 2) explained:

Russia helped because we didn't want to touch gas, but then Russia started saying that we needed to pay in rubles, and half of the European companies said no way, and then Russia started cutting supplies. So, we had a Russian dependency that we were afraid of tackling, and all of a sudden, Russia trying to punish us, basically included gas in the menu of sanctions.

Bulgaria, Denmark, Finland, the Netherlands and Poland refused to comply with Russia's demands, and the Nord Stream explosion in September 2022 reduced Russia's gas supplies to the EU by 88% (BBC, 2022b). However, the EU's attempts to end deliveries of Russian oil required extended negotiations among member states. While Germany's position gradually became more accepting of the plan, countries such as Czechia, Hungary and Slovakia had deep reservations about the embargo due to their high dependence on Russian oil (Fleming, Foy

and Chazan, 2022; Tidey, 2022). Highlighting EU-level negotiations, a senior EU diplomat (Interview 7) stated:

It's not that ambassadors enter the room, sit together and vote and then say it's done or not done. Everything comes for a price, everything is transactional. It's a collective action problem; you have twenty-seven players in a room in Brussels, in capitals, twenty-seven audiences, twenty-seven Ministers and so on and so forth.

Referring to differences among member states, another EU diplomat (Interview 2) indicated that they were overcome 'through diplomacy, persuasion, discussions and sometimes arguments and fights', depending on member states' sensitivities to proposals. In this regard, intense negotiations on the embargo on Russian crude oil imports could only be concluded almost two months after the fifth package. While member states agreed to end seaborne deliveries of Russian oil by the end of 2022, exemptions had to be granted to Czechia, Hungary and Slovakia for the deliveries of crude oil via the Druzhba pipeline to achieve a compromise (Rauhala and Aries, 2022).³⁹ Overall, the oil ban marked a significant turning point in overcoming the EU's indecisiveness about reducing its dependence on Russian energy exports.

The sixth sanctions package complemented the EU's REPowerEU plan and External Energy Strategy adopted on 18 May 2022. REPowerEU outlined the increased security problems related to the EU's high reliance on Russian coal, gas and oil; identified reducing these dependencies as its primary objective and a step towards achieving an Energy Union; and set a non-binding goal of phasing out dependence on Russian fossil fuels (European Commission,

³⁹ The sixth package also banned the import of Russian refined petroleum products, prohibited EU operators from transporting Russian oil, removed additional Russian banks from SWIFT and suspended the broadcast of three Russia state outlets (Krukowska and Valero, 2022). Except for the import ban on oil, these measures were not much contentious, as they were mostly the continuation of the previous packages.

2022b). For its part, the External Energy Strategy put the green energy transition at the centre of the EU's transition away from Russian fossil fuels (European Commission, 2022c, p.2).

Negotiations on the sixth package also represented a new trend in member states' approaches to the adoption of subsequent sanctions. Namely, after quickly adopting the first five packages, discussions around sensitive areas became more challenging. An EU diplomat noted the difficulty of balancing member states' preferences: 'The more you put in, the more reason you give some member states to be difficult. The flipside is that if there's too little, the hawks will say this doesn't go far enough' (quoted in Fleming, Foy and Bounds, 2022). Admittedly, Russia's ongoing aggression helped maintain the EU-wide consensus on the necessity of restrictive measures. In the words of another EU diplomat (Interview 5), 'Even if it took a week or more than our Ukrainian friends might have wanted [to agree on sanctions], member states were united in the need to support Ukraine despite disagreements on details of how to do that best'. However, some member states also worked overtime to protect the key areas of their national economies from the negative impact of sanctions. While these efforts did not derail the EU's sanctions policy, they sometimes led to complex and lengthy negotiations. As a senior EU diplomat (Interview 7) highlighted, 'All do not go smoothly; any sanctions package doesn't come without any cost ... So, a full range of instruments in the Treaties were also used to keep the unity together'. Another senior EU diplomat (Interview 11) remarked, 'It wasn't always easy, not only with Hungary, but in the end, we had all the sanctions packages we wanted', adding, 'Sometimes it took a month or two longer, maybe we had to take one or two persons, one or two companies off. We discussed it all together and made that actually'. Thus, the EU

had to make more effort to accommodate some of the member states' strategic objectives to ensure the continuity of its sanctions policy.

Reinforcing sanctions and preventing their evasion

In subsequent rounds, the EU focused on strengthening existing packages and preventing their circumvention in response to Russia's increasing sanctions evasion (Interviews 11, 29). The seventh (maintenance and alignment) package prohibited the import of gold and gold jewellery originating from Russia, toughened export controls of dual-use goods and advanced technology and included asset freezes for fifty-four individuals and ten organisations (Council of the EU, 2022d). Russia's escalation of the conflict through partial military mobilisation, nuclear threats and annexation of four Ukrainian oblasts in September 2022 reinvigorated the sanctions debate. In this sense, the eighth package's main objective was to prohibit the EU operators from transporting Russian oil to third countries above the G7 price cap (European Commission, 2022d), while the ninth package reinforced existing measures by introducing new export bans on Russia (European Commission, 2022e). Both packages required EU-level compromises to be adopted. The implementation of the former generated an agreement on the \$60 price cap and banned the EU, G7 and Australian companies from providing maritime transport and insurance services for ships if the price of Russian oil were above \$60.⁴⁰ It balanced the positions of the Baltic States and Poland, demanding the \$30 cap, and Cyprus, Greece and Malta (countries with crucial roles in Russian oil trade), pushing for the \$70 figure

⁴⁰ The effectiveness of the price cap was debatable, as according to various reports (Cook and Sheppard, 2023), Russia still exported most of its oil well above \$60.

(Euractiv, 2022a; Liboreiro and Koutsokosta, 2022). For its part, the latter package could only be sealed after Germany negotiated derogations from an import ban on Russian fertilisers and Hungary achieved the removal of three Russian officials from the visa-ban and asset-freeze lists (Rettman, 2022).

After agreeing on a largely symbolic tenth package on the first anniversary of Russia's full-scale invasion, member states largely exhausted the restrictive measures they could adopt against Russia. HR/VP Borrell stated in March 2023 that 'There is not much more to do from the point of view of sanctions, but we can continue to increase financial and military support [for Ukraine]' (quoted in Brzozowski, 2023a). At the same time, member states increasingly strived to accommodate their preferences before formally approving sanctions. Greece and Hungary resisted the eleventh package due to the inclusion of some of their national companies in Ukraine's list of 'war sponsors', Austria requested time to examine the twelfth package because of its concerns that Raiffeisen Bank was on the same list, while Hungary delayed the thirteenth package over sanctions targeting some Chinese companies (Foy, 2023b; 2024; Moens, Barigazzi and Kijewski, 2023).⁴¹ Although not all discussions went to the wire, member states occasionally demonstrated a willingness to exercise veto power to achieve their strategic objectives. Commenting on the strategies of Greece and Hungary, one EU diplomat noted: 'It is totally unacceptable to link Ukraine support to the black list ... I can only lament the fact that member states taking files hostage which are quite unrelated to the files going forward' (quoted in Moens and Barigazzi, 2023). Another diplomat stated: 'Certain EU states, with

⁴¹ While some members achieved their negotiation goals, others failed in their objectives, as Hungary failed to remove OTP Bank from the list during EU-level discussions of the twelfth package (Aris, 2023). Later, Ukraine had to temporarily remove the bank from the list to gain Hungary's vote for the EPF funding (Pollet, 2023).

Hungary leading the pack, are becoming increasingly transactional on Russia sanctions and support for Ukraine' (quoted in Rettman, 2023a).

Member states' reservations and concerns about potential adverse effects on the EU economy also prevented the adoption of some of the far-reaching sanctions. Despite the demands of the hawkish members, such as Poland and the Baltic States, the EU did not remove all Russian banks from SWIFT, refrained from banning all imports of Russian gas and oil and did not target the country's nuclear sector (Brzozowski, 2023b; Gavin, Jack and Gijs, 2024). Further, when the Commission proposed to target Russia's LNG industry in May 2024, sanctions did not include provisions directly banning imports into the EU. Member states only agreed to ban Russian LNG exporters' access to reloading services in the EU territory for their transshipment to third countries (Council of the EU, 2024a). Moreover, the EU's efforts to address the circumvention of sanctions targeted specific companies but stopped short of directly sanctioning third-party countries helping Russia (Brooks, 2024; Council of the EU, 2023, 2024a).

4.2. EU-level policy initiatives towards Ukraine

4.2.1. Deepening cooperation without membership perspective (2014–February 2022)

The Maidan Revolution generated considerable changes in the EU's foreign policy towards Ukraine. The signing of the AA in 2014 provided a comprehensive framework and opened new avenues for EU–Ukraine cooperation. The EU's Ukraine policy between 2014 and February

2022 focused on diplomatically supporting the country against Russian aggression, helping its gradual economic integration with the EU and increasing bilateral security cooperation. However, the Union refrained from offering Ukraine a clear path to membership. Despite enhanced EU–Ukraine cooperation, some member states, such as France, Germany and Italy, were still slow to prioritise Ukraine in their Eastern policies and intended to reap the benefits of maintaining good relations with Russia. Hence, the EU was cautious in significantly deepening cooperation with Ukraine between 2014 and February 2022, and the shift in its common Ukraine policy was accompanied by a degree of continuity.

Diplomatic backing against Russian aggression

The EU and member states were resolute in their diplomatic support for Ukraine’s territorial integrity following Russia’s annexation of Crimea and destabilisation of eastern Ukraine (Council of the EU, 2014a).⁴² When the US’s mediation efforts failed in Geneva, France and Germany took the lead in EU diplomacy to end hostilities. The two countries’ endeavours produced the Minsk I (5 September 2014) and Minsk II (12 February 2015) agreements, which prevented the conflict from escalating to a full-scale war. While these agreements were far from ideal for Ukraine (due to ambiguous language and concessions on decentralisation), France and Germany included provisions that, if fully implemented, would ultimately restore its territorial integrity (FT, 2015; OSCE, 2015; UN, 2015).⁴³ Negotiations focused on the

⁴² The EU’s firm stance was complemented by restrictive measures against individuals responsible for threatening Ukraine’s territorial integrity and economic sanctions against Russia (see Section 4.1.1).

⁴³ Former German Chancellor Merkel admitted in December 2022 that the Minsk agreements aimed to prevent Ukraine’s collapse and gain the country time to counter Russia (Hildebrandt and di Lorenzo, 2022).

situation in eastern Ukraine, while the Crimean issue was hoped to be resolved at a later date (Raik et al., 2023, p.27).

The implementation of the Minsk agreements proved challenging owing to the two sides' disagreements over the sequence of actions to be undertaken. Namely, Ukraine demanded the withdrawal of the separatist troops from eastern Ukraine before local elections were held, while Russia insisted that it could occur only afterwards (Allan, 2020, p.1). President Macron's and Chancellor Merkel's meetings with President Putin to break the deadlock did not produce any meaningful outcomes (Chazan, 2016; Mallet, Foy and Peel, 2019). The last Normandy Format meeting with the participation of Putin and Zelenskyy in December 2019, France's Morel Plan and Germany's Steinmeier Formula (though not published) failed to offer tangible solutions that would satisfy both sides (Allan, 2020, p.16). From the EU's perspective, France and Germany did not pressure Ukraine into making concessions to Russia that could violate its territorial integrity at the 2019 meeting (Uacrisis, 2019). In the end, although France and Germany were criticised by some member states, such as Poland and the Baltic States, and by EU diplomats for a lack of transparency and for operating outside the official EU framework, there was consensus within the EU regarding the Normandy Format and the Minsk process (Interviews 1, 18; see also Alcaro and Siddi, 2021, pp.154-161; Lovato, 2024, pp.980-983; Youngs, 2017, p.140). They became the cornerstone of the EU's diplomacy towards the crisis, and the EU constantly reiterated its support for Ukraine's territorial integrity by making the full normalisation of relations with Russia conditional on its implementation of the Minsk agreements (European Council, 2015; 2021a, 2021b; European Parliament, 2016).

Strengthening relations through the AA and DCFTA

Another area of the EU's Ukraine policy contained support for the country's economic integration with the Union. The new Ukrainian government finally concluded the political provisions of the AA in March 2014 and the economic parts in June 2014 (Official Journal of the European Union, 2014). The EU's main objective was to help Ukraine implement the AA, which would gradually align the Ukrainian economy with the EU law and regulatory framework before a potential membership (Interviews 1, 2, 5, 11, 29). To reflect the improved cooperation with Ukraine, the EU introduced new policy instruments that had not been used when relations were mostly confined to the EaP framework. In this context, the Support Group for Ukraine (SGUA) established by the Commission in April 2014, annual summits under the AA framework and the visa-free travel agreement in 2017 were important elements of deepening the bilateral partnership (Interview 11). The SGUA's coordination with other EU institutions and international partners enabled the EU to allocate more financial support to Ukraine (Wolczuk, 2019, p.743). As a result, in addition to €17 billion in grants and loans through the EU and European financial institutions (including €4.4 billion through multiple Macro-Financial Assistance (MFA) programmes), Ukraine was expected to receive around \$25 billion under various International Monetary Fund (IMF) programmes conditional on the reform process (European Commission, 2021b; Timtchenko, 2021). Thus, the assistance to the country became more systematic, dynamic and tailored (Wolczuk and Zeruolis, 2018, p.4). The general coordination of the EU's Ukraine policy took place in the FAC, where ministers discussed the situation in Crimea and eastern Ukraine based on reports sent by EU ambassadors (Interview

18).⁴⁴ At the Commission level, DG Near and the Neighbourhood and Enlargement Commissioner coordinated the signing and implementation of the AA with Ukraine (Interviews 5, 11, 18). Overall, the EU's support helped Ukraine attract more investors from Europe and recover from the shock of a significant GDP decline by 2016 (also Interview 18).

Member states also provided varying levels of bilateral support to Ukraine through development assistance and joint programmes. The degree of support predominantly depended on the countries' economic power, perception of Russia and commitment to the reform process in Ukraine. Some member countries, such as France, Germany and Italy, hesitated to shift away from a Russia-first policy to a Ukraine-first approach in their Eastern policy objectives (Interviews 1, 4, 11, 24). 'Member states had a large spectrum of relations with Russia for years, much better than relations with Ukraine, and there was a kind of inertia in this relation', noted a former senior EU diplomat (Interview 18) and added:

People maintained this relationship, tried to appease and understand Russia and were more inclined to give reasons to Russia's actions and then switch to Ukraine. It took time until the full-scale invasion. So, there was a period that everyone tried to be accustomed to the situation and re-establish relations with Russia.

In this regard, Poland, the Baltic and Nordic states dedicated more resources to supporting Ukraine than those advocating a more balanced EU approach and the ones still prioritising close relations with Russia (Gressel, 2016, p.80; see also Jarabik et al., 2018).

The EU's increasing cooperation with Ukraine was not without challenges. First, Russia questioned the DCFTA's compatibility with Ukraine–Russia trade relations. This led to the delay

⁴⁴ It meant that despite the Commission's primary role in Ukraine's implementation of the AA and legal approximation with the EU rules, member states remained the ultimate drivers of the EU's Ukraine policy.

in the implementation of the AA and the launch of trilateral negotiations between the EU, Ukraine, and Russia in July 2014 (Dragneva and Wolczuk, 2015, p.114). 'There's a famous saying of Putin from earlier years, where he said they had nothing against the AAs. In reality, it wasn't like this,' noted a senior EU diplomat (Interview 11), adding that Russia's demands were maximalist and 'They didn't make any compromises and basically wanted to have a say in the AA'. However, the EU refused to grant substantial concessions to Russia after twenty rounds of talks and was unwilling to postpone the agreement beyond 1 January 2016 (Interview 11; von der Burchard, 2015; see also Raik, 2017, p.62).

The second challenge was the Dutch rejection of the government's approval act of the AA in the non-binding referendum in 2016. It jeopardised the future of the EU–Ukraine relations, as the AA could not enter into force without the ratification by all member state governments (Van der Loo, 2016). The issue was resolved by the EU Council decision, which specifically stated that the AA did not make any future commitments to Ukraine's EU membership and did not offer security guarantees to the country (European Council, 2016). Third and related, without a membership perspective for Ukraine, the early reform process gradually lost momentum (Youngs, 2016). In the absence of such an incentive, the Ukrainian leadership and politicians faced challenges in defining the country's long-term relationship with the EU and proceeding with reforms (Duleba, 2019, p.52; Interviews 2, 24). Although President Zelenskyy secured the EU's assurance to revise the AA at the 2020 EU–Ukraine Summit, the EU was already 'running out of tools to incentivise more difficult reforms', leading to frustration on the Ukrainian side over the future state of bilateral relations (Gherasimov and Litra, 2020). The

absence of a clear path to membership remained the main challenge in the EU's common Ukraine policy until Russia's full-scale invasion.

Security and energy sector support

The EU also ramped up support for Ukraine by helping the country with the security sector reform and energy security. Following the crisis, there were several calls from member states to send observation, police and judicial missions to Ukraine (Emmott and Croft, 2014; Reuters, 2014a). However, divergences among them complicated determining the objectives of the EU's involvement in the security area. While the hawkish members desired explicit and comprehensive EU support for Ukraine, dovish countries still did not want to aggravate Russia's concerns and preferred a limited mission (Novaky, 2015, pp.249-250).⁴⁵ The EU Advisory Mission in Ukraine (EUAM) was launched as a Common Security and Defence Policy (CSDP) tool in December 2014 and represented a middle ground between the preferences of these two groups (Novaky, 2015, p.256, 262). It was a civilian mission intended to provide strategic advice for civilian sector reform and coordinate the work of different ministries and international actors to fight against hybrid threats, organised crime and corruption (EEAS, 2020; Interview 11). Although the EU did not provide lethal weapons, the EUAM was successfully involved in the capacity-building of Ukraine's security services and restoring trust in the police after the Maidan events (Interview 18). The EU's security support for Ukraine was complemented by individual assistance from member countries. However, unlike the US, the

⁴⁵ Member states' positions on the issue were consistent with their foreign policy preferences towards Russia, as the supporters of a more ambitious initiative also advocated a stricter EU policy against the country (Novaky, 2015, p.256).

majority of the EU members refrained from supplying lethal weapons to Ukraine until February 2022 due to concerns over escalation with Russia. France and Germany were particularly sceptical of the idea, while only Lithuania, among more hawkish frontline states, provided lethal aid (Howorth, 2017, p.131; Gressel, 2016, p.26; Marzalik and Toler, 2018).

Furthermore, the EU's support helped Ukraine end direct gas imports from Russia at the end of 2015. Hungary, Poland and Slovakia displayed solidarity with the country by exporting gas through reverse flows when Russia decided to stop its deliveries over the price and debt dispute in 2014 (Daiss, 2016). Although the gas still originated from Russia, receiving it from the EU allowed Ukraine to withstand Russia's price manipulations and constant threats of supply cuts. It was a strategic move that increased Ukraine's energy independence, with one former senior EU diplomat (Interview 18) calling it a 'historical change' for the Union's approach to Ukraine. Concurrently, the Nord Stream 2 project, pursued by Germany and Russia, seriously threatened Ukraine's role as a transit country and energy security. While the US-German agreement pledged to preserve Ukraine's transit role by taking measures against Russia in the event of energy pressure on Ukraine and securing an extension of Ukraine's transit deal with Russia expiring in 2024 (Baunov, 2021), it did not alleviate Ukraine's national security concerns. The EU could not legally halt the Nord Stream 2, and differences among member states prevented it from adopting a coherent position in assisting Ukraine until February 2022.

4.2.2. Supporting Ukraine for as long as it takes (February 2022–June 2024)

The EU demonstrated strategic adaptability to the evolving geopolitical realities precipitated by Russia's full-scale invasion of Ukraine (Borrell, 2022). For the first time since the dissolution of the Soviet Union, the EU's Eastern policy started to be driven by the Ukraine-first approach backed by significant investment from EU institutions and member states (Interviews 5, 11, 18). Despite occasional differences among member states' foreign policies, the EU's common position consistently underlined support for Ukraine's sovereignty and territorial integrity for 'as long as it takes' and 'whatever it takes' (DW, 2022; EEAS, 2024; European Council, 2024b; Interview 5). The EU's multifaceted support included utilising the European Peace Facility (EPF), as well as new initiatives such as the European Union Military Assistance Mission in support of Ukraine (EUMAM) and the MFA+ instrument. Overall, the EU's common policy vis-à-vis Ukraine between February 2022 and June 2024 concentrated on supporting the country's EU accession, providing military assistance and delivering financial and humanitarian aid.

Offering a clear path to EU membership

Ukraine's application for EU membership four days after Russia's invasion was received positively by the Commission, with President von der Leyen stating, 'Ukraine was one of us and we want them in' (quoted in Liboreiro, 2022). On the same day, the Presidents of eight CEE member states declared their support for Ukraine's swift candidacy (The official website of the President of the Republic of Poland, 2022). However, there was no initial consensus at the EU level, as countries such as Germany, France, Italy, Spain and the Netherlands were

hesitant to fast-track Ukraine's membership and refrained from making early commitments (Fella, 2022, p.42; Vela and Sheftalovich, 2022). The Versailles Declaration represented a compromise between member states' diverging positions by underlining that 'Ukraine belongs to our European family' but added that the Commission would submit its opinion based on the EU Treaties (European Council, 2022a; Vela, Lynch and Sheftalovich, 2022).

Russia's intensified aggression made it incredibly difficult to resist Ukraine's candidate status. Previously, despite a new phase in relations following the 2014 crisis, the EU was not prepared to make Ukraine an official candidate. A senior EU diplomat (Interview 2) stated: 'The EU was reluctant to offer accession to Ukraine as to anybody else [before 2022]'. The initial plan was to request the Commission's opinion by triggering the Article 49 TEU procedure, with the response to be provided once the war ended (Lippert, 2022). Nevertheless, the scale of the war gradually tipped the balance in favour of member states favouring Ukraine's candidacy, even if it was evident that the actual membership would take years to finalise. Noting that Russia's intention to prevent Ukraine's Euro-Atlantic orientation paradoxically produced the exact same outcome, a senior EU diplomat (Interview 2) highlighted the EU-level processes:

There is no coordination as such. The Commission makes proposals, and the leaders sort of push in one direction or another, sometimes as a result of a proposal by the Commission, sometimes as a result of their own initiative. It very much depends. I don't know if it's Macron calling Scholz, Scholz phoning Macron or von der Leyen phoning Macron. I don't know how that starts, but at some point, there's a confirmation and critical mass within the Union that believes that's a thing to do.

Another EU diplomat (Interview 5) noted, 'There was this window of opportunity when just for political reasons it wasn't possible for member states to say no to reasonable demands [of Ukraine]', adding, 'It's not a secret to say that Ukraine was attacked gave this [Ukraine's

candidacy] a political spin'. In particular, Russia's ceaseless aggression and atrocities in Bucha and Irpin generated societal pressures in western European countries and streamlined the process (Interviews 10, 11). In this context, the Commission President von der Leyen's questionnaire to President Zelenskyy to initiate the membership was followed by the Commission's recommendation to grant Ukraine candidate status on 17 June 2022 (EEAS, 2022b; Herszenhorn and Gray, 2022). This was backed by France, Germany and Italy despite their initial reluctance to openly endorse the country's candidacy before the Commission's verdict (Herszenhorn, 2022a). Consequently, the Council officially granted Ukraine candidate status on 23 June 2022. Although this was largely a geopolitical decision, the genuine perspective of future membership re-energised the reform process in Ukraine (Interviews 2, 5, 11, 24). An EU diplomat (Interview 5) described it as a 'mutually reinforcing' process, as the EU's interest in supporting Ukraine was complemented by the country's desire to undertake necessary steps in the path to membership. Another EU diplomat (Interview 2) added:

All of a sudden, in the face of a catastrophe, they started doing what we thought they should have planned a long time ago: fighting corruption, limiting the power of oligarchs, being much more efficient in the use of energy, gas pricing and things we had been arguing with them for years.

Although the EU was sceptical about ambitious deadlines such as Ukrainian PM Shmyhal's two-year plan (Lynch, 2023), Ukraine's quick fulfilment of two of the seven criteria to commence accession talks accelerated EU-level processes ahead of the expected Commission report (Liboreiro, 2023). As such, the Commission President von der Leyen emphasised the 'amazing pace' of Ukrainian reforms in July 2023 (Reuters, 2023a). After the Commission's recommendation to open accession talks with Ukraine in November 2023, the political pressure rendered it 'very hard for member states not to say let's open negotiations'

(anonymous EU diplomat quoted in Vinocur, Barigazzi and Caulcutt, 2023). Almost all member states supported the idea despite their reservations and differences over the timeline and its realisation within the EU's existing institutional structure without treaty reforms (Golubeva et al., 2023). The only exception was Hungary, whose opposition was overcome by intense diplomacy during the EU summit in December 2023. It led to PM Orban's abstention from the vote to open accession talks and enabled the EU to move forward without Hungary's formal approval (Bayer, 2023; see Chapter 5). Subsequently, the EU formally started accession talks with Ukraine at the intergovernmental conference on 25 June 2024 (European Council, 2024c). It was another historic step forward in the EU's Ukraine policy, with one senior EU diplomat (Interview 18) describing the acceptance of a country at war and partially occupied as 'revolutionary for the EU'. Consequently, while Ukraine's EU membership is likely to take years to materialise, the start of accession talks decisively solidified the country's European path.

Strengthening Ukraine's military capabilities

In the security area, the EU's cautious approach during the 2014–February 2022 period was replaced by its more resolute support for Ukraine (Interviews 2, 11, 18). Many member state officials and EU diplomats emphasised the necessity of arming Ukraine for 'as long as it takes' and considered it a matter of common European security (FT, 2024; Interview 5). Only a few days after Russia's invasion, the EU activated the EPF to finance the purchase of lethal weapons for Ukraine, which was created as an off-budget mechanism for other purposes.⁴⁶ It was the

⁴⁶ Launched in 2021, the EPF was not originally designed to support a country in active conflict but rather aimed 'to arm those armies in Africa that we [the EU] were training, and for very modest amounts compared to what happened afterwards' (Interview 2).

first time the EU provided lethal weapons to a country at war. The facility was used to reimburse member states for the costs of weapons and equipment sent to Ukraine, share the financial burden across the EU, address Ukraine's ammunition shortages and improve the EU's defence industrial base by reimbursing joint procurement projects (Mills, 2024). This was a monumental moment in the EU's approach to security, as HR/VP Borrell described the step as 'a quantum leap for a union that was originally created to defend peace' (quoted in Liboreiro, 2022). More importantly, the EPF established a centralised system and collective EU umbrella to provide Ukraine with the necessary weapons and avoid supplying redundant equipment (Foy, 2023a).

A wide range of tools established by the Treaties was also employed to uphold collective solidarity (Interview 7). Constructive abstention, used only once before the war (Koenig, 2022, p.7), was employed to address some member states' constitutional and political demands. Namely, Austria, Ireland and Malta constructively abstained from supplying Ukraine with lethal weapons due to their neutrality (Koenig, 2022, p.7), while Hungary used the mechanism to prevent further escalation and due to its emphasis on a ceasefire and peace talks (About Hungary, 2024a; van Brugen, 2023). Despite differences among member states regarding the EPF reform,⁴⁷ they increased the fund by €5 billion to €17 billion (of which €11.1 billion was allocated to supporting Ukraine) and launched a dedicated Ukraine Assistance Fund (UAF) to better address the country's evolving needs in March 2024 (European Council, 2024a). These

⁴⁷ Germany's insistence on to deduct bilateral support to Ukraine from the EPF contributions clashed with France's proposal to use the fund only for the reimbursement of the EU-made equipment. Eventually, the compromise was reached after Germany backtracked its demands to below 50%, while it was agreed that within-the-bloc procurement would be achieved in the medium-term (Barigazzi, 2024a).

endeavours were in stark contrast with the initially proposed €50 million EPF fund in the early days of the war, which was increased to €500 million only upon HR/VP Borrell's interference (Foy, 2023a). Moreover, the EU channelled €1.4 billion in windfall profits from Russia's immobilised central bank assets to Ukraine through the UAF for direct military purchases (Council of the EU, 2024b). Hungary's long-term opposition was overcome through a legal loophole, as the EU argued that the country could not veto the agreement because of its earlier constructive abstention in the establishment of the UAF (Balazs, 2024). However, due to opposition from member states such as France and Germany, the EU was unable to agree on seizing around €200 billion in Russian central bank assets for supporting Ukraine (Arnold et al., 2023; Rappeport, 2023).

The EU-level military assistance was complemented by individual contributions and participation of member states in broader support initiatives for Ukraine. Germany provided by far the largest share of aid within the EU (Kiel Institute, 2024; see also Mills, 2024). Czechia, in close collaboration with the Netherlands and Denmark, launched an initiative to provide 800,000 artillery shells for Ukraine in February 2024 (Fiala, 2024). It aimed to address Ukraine's immediate ammunition needs by purchasing shells from outside the EU and was financially supported by eighteen EU member states (Kayali, 2024). The EU Council meeting in March 2024 also welcomed the initiative and emphasised the necessity of fulfilling the Union's commitment to provide one million artillery shells to Ukraine (separate from the Czech initiative) through various channels (European Council, 2024b).⁴⁸ Further, EU member states

⁴⁸ However, the Czech-led initiative faced significant challenges in terms of financing and procurement, with the Czech government struggling to raise funds. In October 2024, the Ukrainian ambassador to Prague stated that

collaborated with the Ukraine Defence Contact Group (also known as the Ramstein Group) to enhance the country's military capabilities. Germany and Poland led the tank coalition, Denmark and the Netherlands spearheaded the air force (F-16) coalition, while France and Germany assumed leadership of the air defence coalition (Martin, 2024).

In addition to providing direct military support, the EU also launched the EUMAM for training Ukrainian soldiers in October 2022. Differences between Germany and Poland delayed the agreement, as Germany was concerned about Poland's hawkish stance towards Russia and its substantial role in the command-and-control side of the mission. Common ground was found by establishing the mission's combined arms training command (the main hub) in Poland and the special training command in Germany (Brzozowski, 2022; Jacque, 2022; Ostanina, 2023, p.3). Hungary was the only member state not voting in favour by citing its fears of escalation and instead constructively abstained to avoid blocking the proposal (Ory, 2022). The EU kept the mission relatively low profile and organised training outside Ukraine due to potential risks to EU instructors and a lack of consensus among member states on expanding the EUMAM mandate to the Ukrainian territory (Interview 11; Pugnet, 2024). Financed by the EPF, the EUMAM trained more than 52 thousand Ukrainian soldiers by June 2024 (Ministry of Defence of Ukraine, 2024). Even though collaboration with Ukraine was also maintained through the EUAM, the EUMAM represented a significant upgrade in the Union's commitment to the country. The mission helped strengthen the capacity of the Ukrainian Armed Forces and

Ukraine received only one-third of 500,000 shells pledged to be supplied by the end of 2024 (see Durso, 2024; Rod and Jarkovsky, 2024).

provided training for its personnel in operating western-delivered weapons systems (Ostanina, 2023).

Financial and humanitarian assistance

Russia's war rendered Ukraine heavily dependent on western support to provide essential services for its population.⁴⁹ The EU provided €11.6 billion to Ukraine from its budget in 2022, including €1.2 billion in emergency MFA and €9 billion in exceptional MFA (EU4Ukraine, 2023). Minor differences among member states, such as Germany's opposition to the EU budget guarantees for loans and proposal to count bilateral donations towards the EU's overall assistance, were overcome as the pressure grew on the EU to act swiftly (Tamma, 2022a). Further, the EU provided €18 billion to Ukraine utilising the MFA+ instrument. It helped Ukraine's economy and public services survive through stable, regular and predictable financial assistance in 2023 (European Commission, 2024b). Although the majority of member states agreed to proceed with the plan, the Hungarian government was against the joint EU borrowing and advocated supporting Ukraine through bilateral channels (Hungary Today, 2022d; von der Burchard, 2022b). In the end, Hungary lifted its veto after gaining some concessions, as the EU approved the country's pandemic recovery spending plan and lowered the suspended cohesion funds from €7.5 billion to €6.3 billion (Interviews 16, 23; Tamma, 2022c; see Chapter 5).

⁴⁹ Some experts calculated the country's budget deficit from €5 billion to €7 billion per month (Herszenhorn, 2022b; Intellinews, 2024).

The Commission also devised a plan to increase the EU budget and allocate €50 billion in non-military aid through the Ukraine Facility for 2024–2027 to ensure Ukraine’s long-term financial stability (European Parliament, 2023). Once again, Hungary was the only vocal opposition among member states and vetoed the deal despite voting in favour of opening accession talks with Ukraine in the December 2023 Council meeting. However, after the Hungarian government failed to achieve its policy objectives of holding a strategic discussion on the EU’s Ukraine policy and securing the release of its frozen cohesion funds, it proposed a unanimous annual review of the Ukraine Facility (Interviews 2, 6, 8; 9; 14; 23; see also Simon and Mathieson, 2023; Sorgi and Moens, 2024; Vinocur, 2023). This, in turn, produced significant pressure from the EU and fellow member countries, which resulted in Hungary’s approval of the deal with an agreement to hold an annual debate (instead of a vote) on the implementation of the aid package (see Chapter 5; Interviews 2, 7, 12; 14; see also Camut, 2024; Moens et al., 2024).

Another form of financial support for Ukraine was the Commission’s EU–Ukraine Solidarity Lanes, established in May 2022. They were intended to help the country export its agricultural products through EU member states by suspending import duties, quotas and trade defence measures under the Autonomous Trade Measures (ATMs) (Apelblat, 2023). The ATMs were extended until June 2025 by the Council and the EP decision as a sign of the EU’s solidarity with Ukraine (EU Commission, 2024a). The step faced resistance from Bulgaria, Hungary, Poland and Slovakia, as they imposed restrictions on imports of Ukrainian agricultural goods due to concerns about surpluses in their domestic markets (Brzezinski and Kijewski, 2023). These countries reached an agreement with the Commission on exceptional and temporary

preventive measures on imports of certain Ukrainian products in April 2023 (European Commission, 2023). However, the Commission did not extend the deal beyond September 2023, leading to unilateral import bans by Hungary, Poland and Slovakia (Dodd and Welsh, 2024). This did not derail the EU policy, as the majority of the EU members were against extending the temporary import ban advocated by these countries (Kijewski, Brzezinski and Moens, 2023).

The EU was also at the forefront in addressing the humanitarian crisis in Ukraine. The Commission proposed to trigger the Temporary Protection Directive (TPD) on 2 March 2022. The TPD, which provides temporary protection to more than four million refugees from Ukraine, was extended until 4 March 2027 (Council of the EU, 2025b). Its implementation aimed to alleviate the impact on national asylum systems and provide people fleeing the war with temporary protection (Rasche, 2022, p.2). It granted asylum seekers residency rights, access to medical assistance, the EU labour market and education in member countries (Council of the EU, 2025b). Despite the uneven distribution of Ukrainian refugees and some member states' hesitance to activate the directive (Bosse, 2022, p.538; Dahm, 2022), the rapidly deteriorating situation on the ground led to their unanimous backing of the Commission's plan on 4 March 2022. Even in countries such as Hungary, which expressed significant disagreements with EU-level policy initiatives towards Russia and Ukraine, supporting the directive was considered an important part of the government's policy towards the war (Interviews 8, 12, 22).

4.3. Summary

The EU's collective response to the 2014 Ukraine crisis marked a significant change in its years-long Russia policy. At the same time, there was no consensus among member states to completely sever political and economic ties with Russia. The Franco-German partnership led the EU's foreign policy and found a middle ground between the strategic objectives of the Russia hawks and the member states favouring a continuation of relations in non-politicised areas. Namely, while the Franco-German diplomatic efforts managed to freeze the conflict and link the normalisation of relations with Russia to the implementation of the Minsk agreements, the EU's common line enabled selective engagement with Russia in areas of mutual interest. Despite economic sanctions, member states with deep economic relations with Russia were hesitant to abandon their longstanding policies towards the country. Hence, alongside its reaction to Russia's actions, the EU's common foreign policy provided member states with sufficient room for manoeuvre to conduct their independent national policies between 2014 and February 2022.

Russia's full-scale invasion of Ukraine demonstrated the ineffectiveness of the EU's common foreign policy towards Russia during the period from 2014 to February 2022. Due to the breakdown of meaningful diplomatic contacts, the EU's Russia policy between February 2022 and June 2024 consisted of imposing economic sanctions and eliminating its dependence on Russian fossil fuels. Among other things, the EU sanctioned key sectors of the Russian economy by banning crude oil imports, removing most Russian banks from SWIFT and freezing the Russian central bank reserves. Common ground was reached through compromises,

concessions and exemptions between the Russia hawks, which advocated for harsher EU sanctions, and the countries with economic sensitivities, which sought to shield critical sectors of their economies from the sanctions' impact. Consequently, the bilateral relations of some member states, such as Hungary and Slovakia, with Russia and their occasional hardline positions on common decisions did not substantially affect the EU's overall Russia policy.

Concerning Ukraine, the EU intensified cooperation with the country following the Maidan Revolution. The Franco-German partnership mediated between Ukraine and Russia and supported Ukraine's position by not recognising Russia's illegal actions. The signing of the AA and DCFTA enabled Ukraine to deepen its economic integration with the EU, while the EU's security and energy sector support aimed to enhance Ukraine's resilience against Russian threats. However, there was no agreement among member states on Ukraine's EU membership perspective. Further, the EU's efforts to support Ukraine without taking a decisive stance against Russia indicated that the Union still hesitated to fully prioritise Ukraine in its Eastern policy. As a result, the EU's common foreign policy towards Ukraine remained cautious and indecisive during the period from 2014 to February 2022 period.

The EU's relationship with Ukraine reached a new level following Russia's full-scale invasion. Support for Ukraine gradually increased despite disagreements among member states, with even initially sceptical governments backing the EU's common foreign policy towards the country. In this sense, the EU granted Ukraine a clear membership perspective by opening accession talks and provided military support, marking the first instance in which the Union supplied lethal weaponry to a country at war. These steps were complemented by

comprehensive financial support in the form of the MFA loans and grants, humanitarian assistance, the Solidarity Lanes and ATMs to help Ukraine export its agricultural products. Overall, the EU maintained unwavering support for Ukraine by committing to provide the country with the necessary means for as long as it takes to fight Russian aggression.

Viewed as a whole, the evolution of the EU's foreign policy towards Russia and Ukraine illustrates variation in the scope, intensity and coherence of EU-level initiatives over time. This variation is analytically significant, as it shapes the EU-level pressures confronting member state governments and conditions the strategies they are likely to adopt in response. The period of relatively weaker coordination and greater flexibility between 2014 and February 2022 afforded member states wider room for manoeuvre, whereas the post-February 2022 consolidation of EU foreign policy substantially narrowed the space for national divergence. By establishing the content and degree of EU-level pressures across two periods and key issue areas, this chapter provided the necessary empirical foundation for tracing how Hungary and Poland responded to these initiatives. The following two chapters build on this analysis to examine the strategies, mechanisms and Europeanisation outcomes that emerged at the national level.

5. EUROPEANISATION OF HUNGARIAN FOREIGN POLICY

This chapter studies Hungarian foreign policy towards Russia and Ukraine between 2014 and June 2024. Section 5.1. investigates the EU's influence on Hungarian foreign policy towards Russia. It begins by presenting the underlying factors affecting the Fidesz government's strategic objectives towards Russia. Section 5.1.2. explores fragmentation in Hungarian foreign policy as a result of the EU's influence during the 2014–February 2022 period, while Section 5.1.3. allows us to demonstrate resistance to Europeanisation between February 2022 and June 2024. Then, the chapter proceeds to discuss the EU's role in Hungarian foreign policy towards Ukraine. Here, Section 5.2.1. discusses the government's strategic objectives towards Ukraine and EU-level Ukraine initiatives. Subsequently, Section 5.2.2. illustrates the fragmentation outcome of Europeanisation in the light of the minority issue in Ukraine during the period from 2014 to February 2022, whereas Section 5.2.3. shows Hungary's extreme intransigence and resistance to EU-level initiatives towards Ukraine between February 2022 and June 2024.

Analytically, the chapter applies the Europeanisation framework developed in Chapter 2 to trace how EU-level foreign policy initiatives interacted with the Hungarian government's strategic policy objectives over time to produce change in the country's foreign policy. It examines how changes in the scope and intensity of EU-level pressures conditioned the strategies adopted by the Fidesz government and the mechanisms through which EU influence translated into national foreign policy change. By distinguishing between the periods of relatively lower (2014–February 2022) and higher EU-level pressures (February 2022–June

2024), the chapter captures within-case variation in Hungary's responses and explains shifts between fragmentation and resistance as Europeanisation outcomes (see Table 4). Rather than treating Hungarian foreign policy as static, the analysis reconstructs the causal processes linking EU-level initiatives, national strategies and mechanisms of change, thereby enabling a systematic assessment of the EU's role in shaping Hungary's foreign policy towards Russia and Ukraine.

5.1. Hungarian foreign policy towards Russia

5.1.1. Hungary's strategic policy objectives towards Russia

Hungary's foreign policy towards Russia has been widely criticised as pro-Russian (Buzogany, 2017; Coakley, 2022). Therefore, it is essential to identify the Fidesz government's broader EU and foreign policy objectives and their implications for Hungary's Russia policy before examining Europeanisation. In this sense, three interrelated factors warrant particular attention: the defence of national sovereignty within the EU, interconnected foreign and economic policy and Hungary's view of relations with Russia.

The Fidesz government has been against a supranational EU, deeper integration and power transfer to Brussels in foreign policy and considered the EU a community of nation-states (Interviews 9, 12, 22, 30; see also Hettyey, 2021, p.133; Sadecki, 2022, p.258). One former senior Hungarian diplomat (Interview 22) stated: 'Hungary isn't interested in the creation of

the United States of Europe but rather supports the existence of a European Union of strong nation-states'. Unsurprisingly, Hungary has consistently been against the QMV and sought to protect its national interests in the CFSP area (About Hungary, 2019; Liboreiro and Zsiros, 2023). PM Orban has regularly emphasised the necessity of maintaining national sovereignty within the EU and compared it to the Soviet Union: 'We had to dance to the tune that Moscow whistled, Brussels whistles too, but we dance as we want to, and if we don't want to, then we don't dance' (quoted in Hulsemann, 2023; see also Paris, 2022, p.539; Visnovitz and Jenne, 2021, p.694). The PM has sometimes described the government's EU strategy as a 'peacock dance', a tactic that seeks to obstruct, backtrack in the face of EU-level pressures and make some changes, while ultimately continuing along the same policy path (Csehi, 2020; Elteto and Szemler, 2023, p.276; Kingsley, 2018; Muller, 2018; also Interview 28). A senior Hungarian diplomat (Interview 12) highlighted:

We see the EU as a tool to advance our national interests. If the EU cooperation, even proposals that might be considered federalist (i.e., the European defence industry, European army), is in our interest, we are happy to do them. If the EU wants to destroy our national interests, we are going to oppose it until the last moment possible ... We remain very cooperative apart from those issues that are clearly against our national interest.

The ideological struggle between Hungary and the EU, stemming from Fidesz's illiberal view of democracy and defence of traditional European values (Buzogany and Varga, 2017; Csehi and Zgut, 2021; Interview 22; Orban, 2014), has also contributed to the government's scepticism of the EU's role in foreign policy. To be sure, Hungary has not been against the wider EU project and has shown no intention of leaving the Union. It has been evident in PM Orban's statements that 'Our plan is not to leave the EU ... Our plan is to conquer it' (quoted in Hall, Dunai and Foy, 2024) and 'We need to go deeper, occupy positions, gather allies and fix the European Union'

(quoted in Lynch, 2024). Thus, the government's broader objective has been to change the EU from within by staying in the mainstream rather than drifting to the fringe of the political spectrum (Interview 9). However, the prevailing view among Hungarian government circles has been that the EU's common foreign policy represents the interests of mainly bigger member states, which has limited the voice of smaller and less influential members (Interviews 8, 12). One senior Hungarian diplomat (Interview 12) quoted George Orwell to describe this power imbalance: 'All animals are equal, but some animals are more equal than others, and that applies to the EU as well'. According to this view, powerful members promote their national interests to the EU level and present them as European values so that it is difficult for others to deviate from them (Interviews 8, 12). Therefore, when Hungary's strategic policy objectives conflict with the EU's common foreign policy, the government has been determined to preserve its sovereignty.

After returning to power in 2010, one of the key directions of PM Orban's foreign policy objectives was the Eastern Opening, which aimed to cultivate closer relations with Hungary's non-traditional partners for pragmatic economic reasons (Interview 22; Visnovitz and Jenne, 2021, p.695). The new direction in foreign policy was accompanied by two important developments. First, the structure of the MFA underwent significant changes. FM Martonyi was first replaced by Tibor Navracsics, and then Peter Szijjarto was appointed as the new FM. Szijjarto's previous experience as the State Secretary for Foreign Affairs and External Economic Relations at the PM's Office and his role in charge of the Eastern Opening strategy signalled an increased focus on the economy and cooperation with Eastern countries (Vegh, 2015, p.51). Simultaneously, the Ministry was complemented by a trade component (becoming MFAT) in

2014, with the PM's Office assuming the oversight of areas such as EU affairs, sanctions policy and strategic planning (Interview 14; Vegh, 2015, pp.51-52; Visnovitz and Jenne, 2021, pp.690-691). As a result, economic policy became integral to Hungary's foreign policy objectives. Further, much of the decision-making was centralised in the hands of the PM's Office and its close circle, leaving diplomats to execute orders with little input and contribution to the process (Interviews 9, 14, 16, 23; Muller and Gazsi, 2023, pp.408-409). Diplomats started to provide fewer individual positions and were expected to strictly follow orders from Budapest, which limited their influence to change the substance of Hungary's foreign policy (Interview 14).

Second, the organisational reforms coincided with PM Orban's statement in 2014 that 'Ideology-oriented foreign policy has been invented by smart countries for foolish ones' (quoted in Deak, 2015), which was later included in Hungary's National Security Strategy. It formed the foundation of the government's connectivity-based strategy, which included cooperation with countries that do not align with western interests, values and principles in order to improve the country's economic posture and establish itself as a regional middle power (Honvedelem, 2020). As the PM's Political Director Balazs Orban argues, at a time when the US hegemony is in decline, ideological and bloc-based foreign policy is not in Hungary's national interests (Orban, 2024b). The Hungarian government does not want to increase its dependence on western and liberal institutions and attempts to balance them with investment from countries such as China, Russia and South Korea (Interview 9; see also Hettyey, 2021, p.134; Visnovitz and Jenne, 2021, p.697). Thus, while remaining within the Euro-Atlantic institutional structures, the government wants to reserve its independent foreign relations and

maintain uninterrupted cooperation with non-western countries. Hungary's geographical location enables it to be a bridge between the West and East, and any potential conflict between them would threaten its FDI-driven and export-oriented transit economy (Kovacs, 2022b).

In the context of the Eastern Opening and connectivity-based strategy, Russia emerged as one of Hungary's key partners. This new direction entailed avoiding bloc-based foreign policy, separation and decoupling and fostering wide networks with both western and non-western countries to strengthen Hungary's economy and achieve its objective of becoming a developed state and regional middle power (Orban, 2024b, pp.9-25, 200-220). In November 2014, MFAT Szijjarto underlined that Hungary's goal was to avoid a divided Europe and 'prevent a situation in which we [Hungary] have rivals, not allies, in Europe' (quoted in VOAnews, 2014). More importantly, Russia was not considered an imminent threat to Hungary. Underlining major differences between the Polish and the Hungarian general view of Russia, a former Hungarian diplomat (Interview 19) summarised:

We don't have a common border with them, we don't want them to get closer to us, but we don't care about them. We are not frightened of them; they come and go. And now, I'm talking about the political elite, and not only this government but the previous one as well, we think we can deal with Russia because there is a joint interest on both sides.

Hence, the government had no reservations about maintaining close economic cooperation with Russia, which reflected the growing importance of economic diplomacy in Hungary's foreign policy objectives (Interviews 12, 16, 13, 14, 19, 22, 30). A former Hungarian diplomat (Interview 19) stated that Russia is a distant power for Hungary, adding, 'It's not love, it's not hate, it's very neutral and mutual respect'. Consequently, frictions between the EU's common

Russia policy and Hungary's national foreign policy were to be expected in the event of potential divergences, which would not necessarily stem from the Hungarian government's pro-Russia stance, but rather Hungary's broader EU, foreign policy and Russia strategies.

5.1.2. Following the mainstream despite contradictory objectives (2014–February 2022)

The Hungarian government's intention to maintain close relations with Russia following 2014 sometimes earned the country the name of Russia's Trojan horse within the EU (Bardi and Cragg, 2021; Bryne, 2017; Orenstein and Kelemen, 2017). The government's pragmatic policy line might have indicated that Hungary resisted the EU's common foreign policy towards Russia between 2014 and February 2022. However, a closer inspection suggests that Hungary, in fact, changed its foreign policy to align with the EU's common line. In the context of the EU's response to the 2014 Ukraine crisis, Hungary's Russia policy involved general support for the EU's common action, inability and reluctance to influence the official EU position, close bilateral economic cooperation with Russia and verbal opposition to the EU's sanctions policy. Due to the ambiguity of the EU's common policy, changes in Hungary's foreign policy were modest, allowing the government to employ strategic action and largely maintain its pre-2014 Russia policy without facing significant EU-level pressures. Consequently, the incoherence between the national and the EU-level policies produced fragmented Europeanisation. The government aligned with the EU where its strategic foreign policy objectives were not affected while pursuing its national goals and disagreeing with the EU in areas that its strategic objectives contradicted with EU-level initiatives.

Hungary's diplomatic position after the 2014 crisis

The Hungarian government adopted a cooperative strategy when the EU responded to Russia's illegal annexation of Crimea, as its immediate diplomatic reaction was in line with the EU's common position (Interview 30). A Hungarian policy expert (Interview 16) captured the country's position between 2014 and February 2022: 'The Hungarian government was not running directly against majority views in the EU and didn't try to kidnap decision-making through vetoes or threatening with vetoes'. Hungary joined the EU's and the V4's condemnation of Russia, with FM Martonyi constantly emphasising respect for Ukraine's territorial integrity and calling on Russia to respect the Budapest Memorandum (Hungarian Spectrum, 2014; Sadecki, 2014b; Sijursen and Rosen, 2017, p.31). PM Orban also underlined the necessity of negotiations between the sides to find a peaceful resolution to the crisis: 'As far as the solution to the situation goes, the Hungarian position is that a solution must be achieved through negotiation' (quoted in Feledy, 2015, p.75). Thus, Hungary supported the Normandy Format when it emerged as a mechanism to mediate the conflict but did not actively contribute to the talks. 'We did not want to participate in this Normandy Format because we realised that we are a small country', stated a former Hungarian diplomat (Interview 19), adding, 'Hungary's position was that we should end the war and go back to business as usual because that is helping us. Russia and Ukraine are enormous markets'. Statements by various Hungarian diplomats and policy experts (Interviews 12, 16, 19, 22) confirmed the primacy of the economic logic in Hungary's foreign policy towards Russia and the crisis. The Hungarian government considered the Franco-German mediation far from ideal but important to stabilise the situation. A former senior Hungarian diplomat (Interview 22)

remarked, 'The so-called Normandy settlement talks were doomed to fail, as the US wasn't formally involved', noting, 'The West probably didn't expect any results from this format'. Referring to the PM's speech, another senior Hungarian diplomat (Interview 12) summarised the country's position:

The difference between 2014 and 2022 was that back in 2014, with the leadership of Merkel and others, we were able to contain the conflict at a very early stage. It wasn't ideal; deals that end wars aren't usually ideal, but they're still better than fighting, and the Minsk agreements were held for another eight years ... Between 2014 and 2022, Europe was able to balance its political interests, political/public face and economic interests.

From the Hungarian perspective, the EU's diplomatic response to the crisis had limitations but did not considerably challenge the substance of the government's strategic foreign policy objectives, and the EU and member states did not pressure Hungary to alter its policy course. Therefore, there was no reason for the government to abandon a cooperative strategy and resort to conditional dissent. The Ukraine crisis did not represent a strategic shock for Hungary as much as the migration crisis, which defined the government's threat perception and discourse at the time (Interview 16, 30). Hungary felt comfortable aligning its broader Russia policy with Germany's position (Interviews 8, 13, 14, 30), whose preferences predominantly formulated the EU's common Russia strategy and conformed with the government's position to de-escalate the conflict in eastern Ukraine (Feledy, 2015, pp.72-74; Interview 14). PM Orban consistently praised Chancellor Merkel's handling of the situation between 2014 and February 2022.⁵⁰ A Hungarian government policy advisor (Interview 8) also spoke highly of Chancellor Merkel's influence, remarking that when there were debates around the Nord Stream 2, and

⁵⁰ After Russia's full-scale invasion the PM argued that if the Chancellor were in power she 'would have done what she did after the Russian invasion of Crimea: isolate the conflict, not internationalise it' (quoted in About Hungary, 2024b; see also Welt, 2024).

Poland and the Baltic States were complaining, she could exert her influence and separate political and business relations with Russia. A Hungarian policy expert (Interview 13) highlighted Hungary's foreign policy at the time: 'In the Merkel era, what Germans did, we just had to copy and paste it and do it in our way. If the largest economy in the EU can do this, that means we can do the same'.

Nevertheless, there is little evidence to suggest that the Europeanisation of Hungarian foreign policy took place through cross-loading. First, Hungary did not engage in direct policy transfers from the Franco-German leadership, and its starting position towards the crisis was not much different from Germany's (Interviews 8, 14, 16; Kucharczyk and Meseznikov, 2015, p.11). Second, the Hungarian government was neither diplomatically active in shaping the EU's Russia policy nor engaged in regional formats such as the V4, and it did not alter its national policy position due to joint initiatives or coalitions within the EU (Interview 14). France and Germany were largely in the driving seat, which restricted other member states' influence in formulating the EU's Russia policy. The Hungarian government adjusted its national position to the EU line after France and Germany negotiated with Russia and Ukraine and largely determined the main contours of the EU foreign policy, indicating the EU's direct role (downloading) in changes in the country's foreign policy (see Chapter 2).

Simultaneously, Hungary did not take its limited opportunities to have a say in the EU's Russia policy (Interview 16; Kucharczyk and Meseznikov, 2015, p.11). A former senior Hungarian official (Interview 30) noted: 'We trusted the European great powers. We are a very small player here, so we never had the ambition to be a negotiator or a broker of that sort'. It was

difficult for Hungary to take unilateral action due to its relative size and influence and say, 'Hey, guys, this isn't going to fly, we need to do this and that' (Interview 14; also Interview 8). In this context, the Trump administration between 2016 and 2020 presented a limited window of opportunity for the CEE countries to play a more important role in the region. The US was interested in cooperating with them due to its souring relations with Germany, differences over NATO with western Europe and opposition to the Nord Stream 2 (Interview 14). However, the V4's success in shaping the EU agenda on migration did not translate into the Russia case because of diverging geopolitical, economic and domestic factors among the group members (Bayer, 2017; Kucharczyk and Meseznikov, 2015; Racz, 2014).

Russia was a dividing issue within the V4 and never became the main priority for common action. A former Hungarian diplomat (Interview 14) remarked: 'When we had the opportunity to steer, to build local coalitions, Hungary either failed or didn't take the opportunity'. For its part, the US during Trump's presidency did not openly pressure the Hungarian government to downscale its cooperation with Russia. Although the US signalled its unhappiness about Hungary's Russia policy a few times, they were behind closed doors, in line with 'a normal method of diplomacy' and not threatening in tone (Interviews 14, 16). The issue was not raised during PM Orban's meeting with President Trump at the White House in 2019, and the US ambassador Cornstein also refrained from criticising Hungary's close relations with Russia (Interviews 14, 16; see also Bayer, 2019; Frynia, 2019; Hegedus, 2020). Hence, the US's impact on Hungary's foreign policy towards Russia during this period remained limited. The Europeanisation of Hungarian foreign policy happened through downloading from the EU's common policies as a result of the government's minor adjustments to its policy positions. The

government's approach consisted of strategic action, as it strategically aligned with the EU-level policies that did not contradict its strategic policy objectives. The strictly hierarchical nature of the government's foreign policy-making and the limited independence of diplomats constrained any potential individual learning that might have led to policy transfer at the state level, even further reducing room for cross-loading regarding policy substance (see Section 5.1.1).

Business as usual with Russia and sanctions criticism

The Hungarian government's early reaction to the Ukraine crisis may suggest that the Europeanisation of Hungary's foreign policy reflected the adaptation outcome. However, the full picture becomes clearer after examining the country's relations with Russia, which confirms the fragmentation outcome. The government's pragmatic bilateral relations with Russia contrasted with the EU's common policy on numerous occasions. The empirical evidence shows that Hungary did not merely adjust its national position to the EU's Russia policy but also openly expressed reservations about the Union's common line, indicating a tension between the national and the EU levels, which is the primary distinction between the fragmentation and adaptation outcomes of Europeanisation (see Chapter 2).

Hungary became an outspoken critic of the EU's sanctions policy against Russia. Although the government did not block the adoption of restrictive measures, it consistently expressed discontent with the EU's approach, even though it ultimately voted in favour of sanctions. PM Orbán argued in 2014 that the sanctions policy 'causes more harm to us than to Russia' and

‘In politics, this is called shooting oneself in the foot’ (quoted in Szakacs, 2014). A few years later, he stated: ‘Non-economic problems cannot be solved with economic means ... Everyone stands to lose from such solutions’ (quoted in Bryne, 2017). The EU sanctions and Russia’s counter-sanctions were unfavourable for Hungarian agricultural products and exports to Russia, and the country had to look for new markets (Interviews 8, 16). However, the EU sanctions did not target Russia’s energy sector, allowing Hungary to continue uninterrupted and strategic cooperation with the country. A senior Hungarian diplomat (Interview 12) noted: ‘Before that [the full-scale invasion], we were against Russia sanctions when they hurt our economy ... but as long as they were not cut into our immediate economic interests, we could live with them.’ When the EU adopted largely symbolic measures due to Russia’s increasingly aggressive policies following 2018, Hungary did not oppose common action. Namely, the government joined the EU’s solidarity with the UK after the Skripal poisoning in 2018 by expelling one Russian diplomat (Szabo, 2019). Further, although still defending the return to business as usual, Hungary backed the EU’s travel bans and asset freezes against six individuals and one entity linked with the Navalny poisoning in August 2020 (Baczynska and Chalmers, 2020; Council of the EU, 2020). Thus, Hungary remained cooperative regarding the EU’s sanctions policy, as the government’s strategic policy objectives were not significantly affected. Its strategic action consisted of following a less desirable EU line while still being critical of sanctions.

Hungary also did not scale back its bilateral relations with Russia. From Russia’s annexation of Crimea to its full-scale invasion of Ukraine in February 2022, PM Orban and President Putin held six high-level summits in Budapest and Moscow to improve bilateral cooperation. The

main theme of these summits was economic cooperation and energy security, as the Hungarian government aimed to proceed with the Paks 2 and minimise the sanctions' impact on bilateral relations (Istrate, 2021, pp.8-9). Noting Hungary's energy dependence on Russia, a senior Hungarian diplomat (Interview 12) stated: 'If you look at our policy towards Russia and its European implications, it's basically focused on the economic interests of the country'. Energy security was the core element of this relationship, as Russia provided cheap and affordable natural resources for Hungarian economy (Interviews 8, 12, 13, 14, 22; see also Kaminski, 2015). Although the government intended to diversify both supply routes and sources, Hungary's landlocked geographical position, the lack of infrastructure and, more importantly, the costs of replacing Russian energy complicated these efforts (Interviews 8, 12; 16; 22; see also Deak, 2014; Racz, 2014, p.5). Access to cheap and affordable energy was critical for the government's domestic and economic strategy for two reasons. First, providing energy subsidies for households was one of the main campaign promises of the government before the 2014 election (Interview 13; Racz, 2021). Second, the government's economic development strategy was predicated on the mixture of cheap energy from Russia, technology from Germany and relatively inexpensive labour in Hungary (Interviews 16). Replacing cheap Russian gas and energy supplies with more expensive alternatives would have had significant implications for the government, and 'It was obvious for us [the government] that we should keep this model as long as possible' (Interview 30).

In the light of these, Hungary was the first member state to break ranks with the EU's common decision not to organise bilateral summits with Russia by inviting President Putin to Budapest on 17 February 2015 (Bryne, 2015; Deak, 2015). Even though Hungary received the backing of

the EU Council (Feledy, 2015, p.77), the event displayed the importance the Hungarian government attached to its relations with Russia. The western partners were concerned about Hungary's growing energy dependence on Russia and Russia's potential usage of this relationship to destabilise the EU and NATO (Bryne, 2017; Hopkins, Peel and Foy, 2019). However, Hungary did not reconsider the agreement on constructing the Paks 2 nuclear plant with the support of a €10 billion credit from Russia, which had been signed before Russia's annexation of Crimea. Further, the government supported the South Stream gas pipeline until its cancellation in late 2014, finalised the deal to join Gazprom's TurkStream pipeline in 2017 and agreed to a new 4.5 bcm gas deal with Russia in 2021 (Euractiv, 2017; Hungary Today, 2021; Szakacs and Than, 2014). Underlining Hungary's lasting place within the EU and NATO (Euractiv, 2019), PM Orban defended his government's Russia policy: 'We should be very, very tough on the military side in relation to Russia and we should be very cooperative on the trade side. We are very weak on military and we are very tough on trade' (quoted in Baczynska and Chalmers, 2020). The PM also criticised the EU's Energy Union plan on the grounds of interfering with member states' sovereignty, which would have enabled the Commission to inspect individual energy deals with non-EU countries (Gotev, 2015).

In principle, these steps conflicted with the EU's Energy Security Strategy, which emphasised the heavy reliance on a sole external provider as the key challenge to energy security (European Commission, 2014). However, the relatively loose nature of the EU's common policy against Russia and the inclusion of the selective engagement provision within the Five Guiding Principles (European Council, 2015b) allowed Hungary to pursue its strategic policy objectives without significant pushback and pressures from EU institutions and fellow member states.

Considering Germany's Nord Stream 2 agreement with Russia and other member states' involvement in the project, Hungary's position regarding energy security was hardly any different from the EU mainstream (Interview 14; see also Dempsey, 2017). For its part, the US also avoided criticising Hungary, as its reaction did not go beyond statements expressing unhappiness about the country's Russia policy on some occasions (Interviews 14, 16). In this context, the government's strategic action entailed subscribing to sanctions in relatively less important areas, maintaining its Russia policy largely intact and rhetorically opposing the EU policies when they contradicted with its strategic policy objectives. The government could not shape the EU's common line based on its strategic policy objectives, and Hungary's foreign policy was not entirely at odds with the EU, which helps us eliminate the no Europeanisation, transformation and resistance outcomes (see Chapter 2). At the same time, Hungary adapted to the EU's common line but also openly expressed reservations about the EU's common Russia policy, remaining committed to pursuing its national objectives even at the risk of going against the Union. This excludes adaptation and means that there were tensions between the national and the EU-level policies characterising the fragmentation outcome of Europeanisation, which resulted in modest changes in Hungary's foreign policy.

5.1.3. Railing against the EU (February 2022–June 2024)

Following Russia's full-scale invasion of Ukraine, the Hungarian government did not alter its strategic objectives towards Russia. Therefore, most of its core objectives remained at odds with EU-level policy initiatives towards Russia. Admittedly, the Hungarian government condemned Russia's invasion and formally voted for the EU's fourteen sanctions packages

against the country during the period from February 2022 to June 2024. However, these actions were coupled with frequent clashes with the EU's common foreign policy towards Russia. They signified the Hungarian government's conditional dissent strategy, which was consistently accompanied by hostage-taking to realise its interests, resulting in significant pressures from EU institutions and other member states. The government's strategic objectives towards Russia comprised advocacy for a ceasefire and peace, strong opposition to sanctions and efforts to maintain energy cooperation with the country. Thus, in the light of the EU's more resolute and harsher response to Russia's invasion, Hungary's foreign policy paled in comparison. Put differently, times changed, but Hungary's foreign policy largely did not. This inevitably generated significant contestation of EU-level Russia initiatives and led to the resistance outcome of Europeanisation.

Early diplomacy and a peace narrative

In the early months of the war, the Orban government adopted a cooperative strategy for a brief period. This might indicate that Hungary would follow the EU's common line towards Russia, producing either the adaptation or fragmentation outcome of Europeanisation. Although Hungary was by no means one of the diplomatically active states, PM Orban condemned Russia's military aggression together with the EU and NATO partners (Spike, 2022) and expressed his willingness to support sanctions by stating, 'Whatever sanctions EU members agree on, we'll back them' (quoted in Hungary Today, 2022a). In this regard, Hungary did not oppose the EU's first five sanctions packages against Russia. The government's initial cooperative strategy was predicated on the expectation that the war would be limited to

eastern Ukraine and quickly de-escalate, as in 2014–2015, without necessitating a far-reaching EU response against Russia and harming Hungary's economic interests (Interviews 14, 16; see also Csiki Varga, 2023, p.35; Szabo and Panyi, 2022). The government envisaged a low-scale Crimea-like scenario and then expected a contained conflict in Donbas and a partial return to the status quo ante (Csiki Varga, 2023, p.35). Specifying Hungary's position as strategic calmness, PM Orban stated that it would be in Hungary's best interests that the war ended quickly (Kovacs, 2022a).

Nevertheless, once it became obvious that there would be no quick end to Russia's invasion, the government's cooperative strategy began to unravel and diverge from the EU's common stance, which would ultimately lead to the resistance outcome of Europeanisation. After carefully analysing opinion polls, the government adopted a peace narrative as its official position towards the war before the general election in April. A senior Hungarian diplomat (Interview 12) explained:

There was one thing that the Hungarian population was afraid of, which was the war. The government decided to run on the peace ticket in the election. And 95% of Hungarians support peace, but nobody knows what it actually means. The government got stuck with this narrative, but in the meantime, it also started to make inroads at the EU level because other political parties came up with the same idea that 'Why do we have to fight in Ukraine?'. So, this became a bit of a self-fulfilling prophecy when it comes to our position on Ukraine.

The emphasis on peace and negotiations gradually became the government's official policy line. It signified a shift from a cooperative strategy to a conditional dissent strategy, as the government became more vociferous in its message and contestation of the EU. The protracted conflict was considered a serious threat to Hungary's economic interests, and the government believed that Ukraine could not win the war, with the western support for the

country prolonging hostilities (About Hungary, 2023b; Bayer, 2022c; Kovacs, 2022a; Simon and Gulyas, 2023; Thorpe, 2023; also Interview 12). PM Orban argued that 'Ukraine is no longer a sovereign country' because of its dependence on the West and 'control over developments should be transferred back from soldiers to politicians and diplomats' (quoted in About Hungary, 2023b). Hungary occasionally floated the proposal of giving Russia security guarantees, which did not gain support among the EU partners (Jack, 2023). Admittedly, the government did not advocate recognising Russia's territorial gains or ask Ukraine to surrender. Hungary repeatedly called for an immediate ceasefire, leaving the discussion of unsettled issues for later negotiations (Interviews 12, 23, 30). Underlining that Hungary's position was to achieve a ceasefire, a former senior diplomat (Interview 22) added: 'This could be followed by peace negotiations, which may or may not bring an agreement, but at least, there would be no victims'.

Nonetheless, Hungary's detailed peace plan remained unclear, with the government standing alone and isolated in its proposal, receiving no support from other EU leaders (Interview 28). A policy advisor to the government (Interview 8) noted that nobody except the Hungarian politicians and diplomats proposed anything or wanted to end the war, which constituted one of the biggest differences between the EU's and Hungary's positions. One former diplomat (Interview 14) commented on this strategy: 'It seems the Hungarian government still thinks that we are around 2015 and that [the war] will go away and not become permanent'. Despite the government's campaign and 'peace march' before the EP elections (Spike, 2024), Hungary remained isolated within the EU and persisted with the conditional dissent strategy. Its isolation was demonstrated by the efforts of the Belgian Council presidency and EU member

states to limit Hungary's opportunities to derail the EU's common position before the country's Council presidency in July 2024. Member states finalised the agreements on the fourteenth sanctions package and weapons purchases for Ukraine and floated the idea of downgrading their participation in EU Council meetings in Budapest (Euractiv, 2024a). Hungary's isolation restricted its opportunities to establish a coalition of like-minded states to oppose the EU's common position, which prevented cross-loading and meant that Europeanisation happened mainly through downloading. These developments also showed that even when the Hungarian government did not employ hostage-taking, its broader contestation of the EU continued, proving the resistance outcome of Europeanisation.

Opposition to sanctions

Hungary's emphasis on peace and intention to continue energy cooperation with Russia contradicted the main principles of the EU's broader Russia and sanctions policies. A senior Hungarian diplomat (Interview 12) described the EU's position on the war as a 'moralising ideological doctrinaire approach', which was very 'alien' to the foreign policy Hungary pursued in the last fourteen years (Interview 12). The impact of sanctions on Hungarian economy and 'the fact that the EU foreign policy towards Russia has nothing to do with reality but has a lot to do with wishful thinking' (Interview 12) were sources of disagreement between Hungary and the EU. Hungary directly opposed the EU's sanctions against Russia once they started to affect its strategic policy objectives. As a result, the Hungarian government's conditional dissent strategy became more pronounced. The shift in the government's position contrasted with its initial approach to the first five sanctions packages, which had been driven by the belief

that it was unnecessary to obstruct the EU policies when the conflict would be over very quickly (Interview 16). A senior EU diplomat (Interview 2) summarised Hungary's approach to the EU's sanctions policy:

Hungary was less obstructionist or critical at the beginning ... When sanctions became deeper and much more intense, they started to make sure that sanctions would not impact them on their core issues and stayed out of the most controversial measures. It would be unfair to say that Hungary is pro-Russia or pro-Putin, but certainly it puts own interests first rather than those of the collective.

The Hungarian government was particularly concerned about the negative influence of sanctions on the EU and Hungarian economies (Interviews 12, 19, 22, 30). Hungary did not shy away from controversies and expressed its disagreement with the EU's policies proudly and directly (Interview 9). Mentioning Hungary's general scepticism towards the EU's foreign policy, a senior EU diplomat (Interview 2) stated that the country had concerns regarding 'everything we have done and that we plan to do' after Russia's full-scale invasion of Ukraine. One senior Hungarian diplomat (Interview 12) remarked: 'Rhetorically, we stiffened up against the European approach because we think that what we are doing right now is an economic suicide, and we'd like to live if there's one chance ... and we became more outspoken'. A former policy advisor to the Hungarian government (Interview 8) noted that sanctions were drafted very hastily to the extent that even larger member states were sometimes surprised by their content, and the Commission had to walk back. 'There was a zeal to have more Russia sanctions because we had to be on the right side of history', remarked a senior Hungarian diplomat (Interview 12), noting, 'And we cannot really accept this kind of argument partly because the right side of history is usually decided after the war' (Interview 12). In sum, the empirical evidence vividly demonstrates the incompatibility of Hungary's strategic policy objectives with the EU's common Russia policy.

The first serious disagreement emerged over the EU's proposal to ban Russian oil imports in the sixth sanctions package and highlighted the government's conditional dissent strategy and contestation of the EU's common Russia policy. PM Orban and various Hungarian diplomats emphasised the ban's serious potential consequences for the country's economy (Hungary Today, 2022b; Interviews 8, 9, 12). While not derailing the EU measures against Russia, the government constantly criticised the package and tried to accommodate some of its policy preferences before eventually voting in favour of it. The PM equated the Commission's plan to ban the import of Russian oil with 'dropping a nuclear bomb on the Hungarian economy' and considered it unacceptable (Hungary Today, 2022b). A former senior Hungarian official (Interview 30) stated: 'Our very last fallback position was that, okay, you can sanction Russian gas and oil but not the pipeline gas and oil'. The government was also frustrated with the lack of foresight in the EU's proposal, given the country's heavy dependence on Russia.⁵¹ A senior Hungarian diplomat (Interview 12) noted:

Nobody proposed an alternative ... The argument was that 'don't buy Russian oil and gas because it's bad, and you'll have Ukrainian blood on your hands' ... but our friends and allies are not willing to address our immediate economic problems, but calling each other names is easier, I guess.

The rhetorical challenge was backed up by tangible steps, as Hungary took the deal (proposed by the Commission on 4 May 2022) hostage for almost a month before an agreement could be reached (on 31 May 2022). The Commission initially floated the idea of granting Hungary financial compensation through REPowerEU and a two-year transition period to phase out Russian oil imports (Moens, Barigazzi and Vela, 2022). However, the unanimous CFSP decision-

⁵¹ Hungary imported 64% of oil and 95% of gas from Russia before the war (Csernus, 2023, p.3).

making helped the Hungarian government drive a hard bargain, allowing it to secure an exemption for Russian pipeline oil via the Druzhba pipeline and an extension for its import without a specific deadline⁵² (Interview 22; Rauhala and Aries, 2022). Thus, the government changed its initial position and supported the package only after fulfilling its strategic policy objectives without making compromises. Although Hungary's formal support was linked to the EU concessions, it did not constitute a soft issue linkage tactic, as the government delayed the deal and employed its veto as a threatening tactic to secure favourable conditions.

The success of Hungary's hostage-taking can be explained by two factors (see also Chapter 2). First, there was no wider consensus at the EU level. Although the most outspoken, Hungary was not the only country expressing reservations about the Russian oil sanctions, with Czechia and Slovakia also opposing the decision. They were silent in their communications and did not openly challenge the EU's common position. 'Slovakia and the Czech Republic were pretty happy to hide behind our backs', expressed a senior Hungarian diplomat (Interview 12), adding, 'But they did not have to raise the flag because we did that for them. Obviously, they never appreciated that, but we are not asking for political credit or anything'. A Hungarian policy expert (Interview 9) noted other member states' sympathy towards the country's position: 'During the breaks in NATO and EU meetings, other delegations congratulated our diplomats by saying, 'At least you can express it, we are happy that you are objecting to EU policies'' (Interview 9). A former policy advisor to the Hungarian government (Interview 8) added: 'Between meetings, other country representatives sometimes said that, hopefully, you hold out with your position, we agree with you, but due to our governments, we can't say it'.

⁵² The deadline was set for June 2024 for Czechia and December 2022 for the rest of the EU.

Hence, despite not being openly backed by other opposing member states, the lack of consensus limited the EU-level pressures on Hungary and reduced its isolation during negotiations.

Second, Hungary's legitimate concerns regarding the impact of a potential ban on Russian oil imports were swiftly recognised, with the Commission President von der Leyen visiting Budapest to find a common agreement and the EU willing to offer Hungary compensation (Moens, 2022; Moens, Barigazzi and Vela, 2022). The two factors enabled the government to achieve a near-perfect deal, as PM Orban declared a victory over the Commission's proposal (Rauhala and Aries, 2022). Thus, the change in Hungary's policy position and support for sanctions happened through downloading, as the government held discussions mainly with the Council and the Commission to realise its goals (Bayer, 2022b). There was little evidence of policy transfers from other member states (despite various bilateral contacts and phone calls) due to the government's unwillingness to change its early demands and tough negotiating position (see Interview 9). Consequently, the EU's role led to modest changes in Hungary's foreign policy without altering its strategic policy objectives. However, the outcome of Europeanisation was resistance rather than adaptation or fragmentation (see Chapter 2) because Hungary persisted with its criticism and contestation of the EU's common policies on Russia and sanctions, with the government seeking opportunities to challenge the EU when these policies conflicted with its strategic objectives.

Even after gaining concessions on importing Russian oil, Hungary's consistent attempts to extract concessions and obstruct the EU's common line through its conditional dissent strategy

continued. The Hungarian government demanded that the EU exclude the head of Russia's Orthodox Church, Patriarch Kirill, from the six sanctions package. It was justified on the grounds that PM Orban had long considered the issue a matter of religious freedom (Reuters, 2022a). A former senior Hungarian diplomat (Interview 30) explained the government's intention to keep some Russian businesspeople and the church outside of sanctions with its intention to 'save the possibility of a future better relationship between Russia and Europe' and 'not to make it unfixable for the long run'. However, Hungary's opposition to the decision after it had been agreed by EU leaders left the country isolated, with an EU diplomat calling it 'hostage policy' and another EU diplomat noting, 'Hungary has lost the bit of goodwill that was left among its peers in Central and Eastern Europe' (quoted in Liboreiro, Koutsokosta and Murray, 2022).

Within months of the sixth package, PM Orban stated that the EU should push for a ceasefire, and Europe 'has shot itself in the lungs' (Reuters, 2022b; Strupczewski, 2022a). Hungary again asked to remove some Russian ministers and businesspeople from the ninth and tenth packages, delayed the adoption of the eleventh package over the inclusion of the OTP bank in Ukraine's 'war sponsors' list and stalled the approval of the thirteenth package due to sanctions against Chinese companies (Foy, 2024c; Moens, Barigazzi and Kijewski, 2023; Rettman, 2022). The government's tough policy style and opposition to the EU sanctions were severely criticised by other EU partners, with one EU diplomat noting, 'It's got to the point where nothing happens without thinking about how they [Hungary] could ruin it' (quoted in Foy, Tamma and Dunai, 2024). While this hardly changed the government's wider position, Hungary occasionally had to explain its decisions to other member states (Interviews 9, 12). In

the face of increasing criticism, the government spokesperson Kovacs had to elaborate: ‘Hungary’s appeal to review particular sanctions against Russia stemmed from real economic concerns, not geopolitical favoritism’ (Kovacs, 2024b). Overall, even though Hungary’s hostage-taking was most evident during the negotiations of the sixth sanctions package, the government’s consistent differences with the EU and repeated attempts to extract concessions from sanctions showed that the resistance outcome of Europeanisation was not case-specific but exemplified a broader trend in the government’s foreign policy.

Cooperation with Russia despite external pressures

The Hungarian government’s intransigent policy position led to continuous tensions with EU-level policy initiatives towards Russia. It was described as ‘Hungary first’ policy (Interview 12; see also Gavin and Jack, 2024), with one Hungarian policy expert (Interview 9) referring to it as ‘a realistic approach putting national interests above everything’. As observed in its reaction to the EU’s sanctions policy, one of the strategic objectives of the Hungarian government was to maintain economic and energy cooperation with Russia. In this sense, stating that Ukraine’s independence and sovereignty are in Hungary’s national interests, PM Orban noted: ‘But we are not interested in decoupling the European and Russian economies once and for all, so we try to save all we can from Russian–Hungarian economic co-operation’ (Dunai, 2023a). Although the Versailles Declaration, REPowerEU and External Energy Strategy aimed to reduce the EU’s dependence on Russian energy supplies, Hungary continued to import Russian gas and secured exemptions from sanctions on Russian crude oil (see European Commission, 2022b; European Commission, 2022c).

Admittedly, Hungary attempted to diversify its gas supplies through imports from Azerbaijan, Qatar and Türkiye (About Hungary, 2023c).⁵³ However, the volume of the imported gas from these sources was not significant enough to replace Russian gas (Interviews 12, 22, 23).⁵⁴ Thus, Hungary did not join the EU's voluntary 15% reduction in gas use and wanted to address the energy crisis by importing more Russian gas (Ainger and Nardelli, 2022). The government concluded gas deals with Russia to increase supplies and ensure uninterrupted deliveries via the TurkStream (Preussen, 2022). MFAT Szijarto stated that Hungary considered energy supply as 'a physical issue and not a political or ideological one' and 'cooperation with Russia will remain crucial for Hungary's energy security' (quoted in Hungary Today, 2023), confirming the country's unaltered position on the issue. In this context, the government also secured exemptions from the fourteenth sanctions package for the construction of the Paks 2 nuclear power plant (About Hungary, 2023c; Csonka, 2024).

Nothing more clearly demonstrated the importance Hungary placed on maintaining relations with Russia than PM Orban's meeting with President Putin in October 2023 in Beijing. The PM diverged from the EU's common position and was the first EU leader to meet the Russian President since the Austrian chancellor Nehammer's visit to Moscow in April 2022. The two sides mainly discussed economic and energy cooperation, and PM Orban underlined the impossibility of decoupling from Russian energy sources by stating that Hungary attempted to

⁵³ MFAT Szijarto specified Hungary's diversification strategy as boosting new supply routes rather than substituting a reliable supplier with a new one (About Hungary, 2023c).

⁵⁴ The landlocked geographical position and the government's domestic strategy of subsidising energy for households (and the necessity of cheap energy for doing that) also imposed significant constraints on Hungary's diversification strategy (see Section 5.1.2).

‘save everything that is possible from our bilateral relations’ (quoted in Seddon and Dunai, 2023). Additionally, the PM reiterated Hungary’s proud strategy of keeping the communication lines with Russia open to achieve peace and added, ‘We are the only one who is speaking on behalf and in favour of the peace which would be the interest of everybody in Europe’ (quoted in Gale, 2023).

These developments and Hungary’s close relations with Russia led to significant criticism by the EU and the US. Some EU leaders became cautious about discussing security and critical issues in the EU and NATO meetings with Hungary (Brzozowski and Kozlov, 2024), and Jens Geier, the leader of the German Social Democrats in the EP, depicted PM Orban’s presence at the EU leaders’ summit as ‘Putin is also sitting at the summit table’ (Vela, 2023b). Hungary’s Russia policy also had implications for the EU’s unity, with an EU diplomat (Interview 6) noting that when a member state’s PM or FM shakes hands with Putin or Lavrov, it affects the EU’s credibility. The US openly pressured Hungary’s foreign policy through media and official channels (Interview 23), with the US ambassador Pressman describing the country’s stance as a ‘fantasy foreign policy that helps Putin’ (Hall and Dunai, 2024) and denouncing its rhetoric as ‘dangerously unhinged anti-American messaging’ (quoted in Ahmatovic, 2024). The ambassador also posited that ‘Hungary’s addiction to Russian energy is dangerous and unnecessary’ (quoted in Soldatkin and Gyori, 2024). All these developments put significant political and public pressures on Hungary to alter its Russia policy (Interview 8). As a former Hungarian diplomat (Interview 14) highlighted, ‘If you are working against the allies’ common interests, you are getting pressured right off the bat, that’s what can be expected’.

Nonetheless, the Hungarian government remained uncompromising and was prepared to oppose the EU's pressures whenever possible. A senior Hungarian diplomat (Interview 12) explained the country's approach to outside pressures: 'The reputational costs are not so interesting for us; haters are going to hate. We are here to keep our economy running and produce economic growth and security for our citizens'. Specifying the EU's impact in Hungary's foreign policy due to strings attached to the EU funds, the diplomat (Interview 12) downplayed the media's and the Union's serious role in shaping the government's preferences:

The Hungarian government is elected by the Hungarian people and not by the New York Times ... Whatever the President of the Commission thinks about the government is not important because what will count is what the Hungarian people think about this government ... We are not interested in what fancy people in Brussels have to say about us. We are responsible to the Hungarian people not to some unelected bureaucrats in Brussels.

The government used these pressures to maintain its popular domestic support. 'It really helps us in domestic politics. In politics, you always have to have an enemy', noted a senior Hungarian diplomat (Interview 12), adding, 'Every time we run into trouble, some idiot in the EP says very crazy stuff that we can put on the billboards, and then we are back again in the game'. Hungary also utilised negative statements from the US for the same purpose and considered them ineffective in changing the government's overarching objectives (Interviews 12, 23). Due to strained relations with the Biden administration, the US had limited influence over Hungary, and the government transformed this into the narrative that the country is under attack from outside (Interview 16). A senior Hungarian diplomat (Interview 12) summarised the government's view of statements by the US officials:

Obviously, the Americans are putting great pressure on us, but we don't really care, to be honest. On the contrary, the more the US ambassador talks about LGBT issues, the better for us because we can put it on billboards, and more people support us in national elections.

The government spokesperson Kovacs struck the same tone by calling the Biden administration's foreign policy towards Hungary an 'ideologically driven approach ... and constant pressuring to do things we are not going to do' (quoted in Morris, 2024). As for NATO, the Hungarian government wanted to maintain it as a military organisation rather than transform it into a political and economic one (Interview 12). The organisation did not influence Hungary's Russia policy, as the government wanted to avoid direct confrontation between Russia and NATO and opted out of its Ukraine-related activities (Bounds and Foy, 2024). Hence, the criticism and pressure from the US did not produce meaningful changes in Hungary's Russia policy. The main source of foreign policy change in Hungary's foreign policy was EU-level pressures (from member states and the EU's broader institutional structure). The government's conditional dissent strategy and hard bargaining tactics, along with consistent contestation of the EU's common line and attempts to maintain its independent Russia policy produced the resistance outcome of Europeanisation. This did not alter the government's strategic policy objectives, leading only to modest changes in Hungarian foreign policy.

5.2. Hungarian foreign policy towards Ukraine

5.2.1. Hungary's strategic policy objectives towards Ukraine

The Hungarian government's foreign policy towards Ukraine has attracted significant criticism and pressure from EU partners due to its intransigent stance regarding Ukraine-related EU

initiatives (Barigazzi, 2024b; Thorpe, 2023; Verseck, 2022). Before investigating the Europeanisation of Hungarian foreign policy, it is vital to consider the Fidesz government's strategic objectives towards Ukraine and EU-level initiatives concerning the country. In this regard, three factors can be identified: the Hungarian minority in Ukraine, the conviction that Ukraine cannot win the war against Russia and occasionally conditioning Hungary's support for EU-level Ukraine initiatives to the resolution of outstanding disputes with the EU and Ukraine.

The rights of the Hungarian minority living in the Transcarpathian region of Ukraine have been the dominant theme in bilateral relations since the two countries regained their full sovereignty. Hungary's steadfast position on the issue has sometimes been seen in the context of the country's close relations with Russia. It has been described as 'suspiciously in line with Russian goals' (Kreko and Szicherle, 2018), 'sucking up to Russia' and a 'pro-Kremlin vessel of propaganda' (Boulegue quoted in Harris, 2018). Noting that Hungary's Ukraine policy 'depends on the Hungarian–Russian relations', a Hungarian policy expert (Interview 16) added: 'The Hungarian government doesn't have to serve particularly Russian interests, but the two actors' interests are very much aligned, even though sometimes running in parallel, not together'. A former Hungarian diplomat (Interview 19) highlighted the sensitivity of the minority issue for the Hungarian society and political parties:

Literally everyone has relatives or friends behind the borders, meaning that this issue is present. You cannot make a government in Hungary without caring about the Hungarian minorities in the neighbouring countries. They [the Hungarian Socialist Party (MSZP)] tried it in the 2000s and are not coming back to power anymore.

The Fidesz government has maintained this focus, and the Ukrainian Parliament's decision to restrict the language rights of national minorities in education in 2017 elevated the issue to the fore of the government's approach to Ukraine-related issues (Interview 30; Kreko and Szicherle, 2018). The government used it in two interrelated ways. Domestically, it was employed to consolidate Fidesz's base by demonstrating that the government is attentive to the Hungarian minority in Ukraine and fulfils its nationalist policy objectives (Interviews 9, 14). At the EU level, as the protection of the Hungarian minorities is enshrined in the country's constitution, the government utilised the issue to justify Hungary's opposition to the Brussels bureaucracy and Ukraine-related decisions (Interview 13).

Another vital element determining the government's position was the conviction that Ukraine cannot win the war, which was also related to the country's peace narrative. PM Orban expressed this view on numerous occasions (About Hungary, 2023b; Reuters, 2023b; Simon and Gulyas, 2023; also Interview 22), and the approach was widely shared among the country's diplomatic circles. A former senior Hungarian diplomat (Interview 22) noted that 'In our view, Russia, which has the world's second largest nuclear arsenal, cannot be defeated by Ukraine even with the full support of the West and NATO', adding, 'Direct intervention by NATO would lead to another world war, which must be avoided at all costs'. Underlining that not many Europeans are ready to take arms to protect their own countries in case of Russian invasion, another senior diplomat (Interview 12) stated, 'We can throw as much money at this problem as we want', emphasising the impossibility of 'winning a war like that'. A former senior Hungarian diplomat (Interview 23) also concurred with the prevailing sentiment: 'There is no military solution. If there is no military solution, we can continue waging this war, and Ukraine

can continue to die. At the end of the day, the result will be the same: a frozen border, less direct conflict’.

Hungary also created obstacles with its unwillingness and reluctance towards ‘all issues concerning Ukraine’ in the EU (Interview 28). During the 2014–February 2022 period, the government’s threats to block Ukraine’s EU integration due to the national minority issue did not translate into Hungary’s formal opposition to the EU’s Ukraine initiatives. However, the government increasingly resorted to veto threats and delaying tactics to demonstrate its dissatisfaction with some of the EU-level initiatives following Russia’s full-scale invasion. While they displayed the Orban government’s wider opposition to the EU’s position towards the war (Interviews 8, 12, 19), Hungary also seized the opportunity to achieve the release of its frozen EU funds (Interview 23; Simon and Mathieson, 2023). One former senior Hungarian official (Interview 30) noted that ‘We used our leverage, our veto power to pick some of the measures and take them out of these [sanctions] packages’ and added:

In some cases, it’s also true that Hungarian diplomacy used this leverage in package deals on other issues.⁵⁵ Why? Because this was the only weapon in our hands. The EU tries to hold financial resources we ought to get, and, in some cases, the only way we could manage to get those resources is to connect these two unconnected issues with each other.

In sum, bilateral issues with Ukraine, differences with the EU’s common position on the war and the Commission’s rule-of-law procedure against Hungary have provided the Fidesz government with powerful incentives to oppose EU-level Ukraine initiatives in pursuit of its strategic policy objectives.

⁵⁵ This strategy became too much of a pattern to be analytically overlooked, with Lithuanian FM Landsbergis stating in May 2024 that 41% of the EU’s resolutions regarding Ukraine had been blocked by Hungary (see Barigazzi, 2024b).

5.2.2. General support for the EU's common line in the shadow of the minority issue (2014–February 2022)

Hungary's early reaction to the Ukraine crisis largely aligned with the EU's common Ukraine policy. However, the adoption of the education law in 2017, combined with the gradual limitation of the rights of national minorities in Ukraine after the Maidan Revolution, clashed with one of the strategic objectives of the Hungarian government. Thus, Hungary's bilateral relations with Ukraine and position on EU-level Ukraine initiatives became increasingly defined by the already prominent issue of the rights of ethnic Hungarians. Admittedly, in contrast to Hungary's blocking of the high-level NATO–Ukraine political meetings, harsh statements by the government officials did not lead to the obstruction of Ukraine's cooperation with the EU. However, the continued emphasis on the minority rights issue, demands on Ukraine to change its laws and threats to block the EU's cooperation with the country remained a source of tension in Hungary's stance vis-à-vis EU-level Ukraine initiatives. Hence, despite the government's largely cooperative strategy and strategic action, the Europeanisation of Hungarian foreign policy was in the form of fragmentation during the period from 2014 to February 2022.

Support for EU diplomacy despite divergent national priorities

The Hungarian government's initial response to the Ukraine crisis was consistent with the EU's common position (Interviews 12, 16, 19, 22; see also Feledy, 2015, pp.73-75). While supporting

the EU line, Hungary acted cautiously and refrained from steps that could deteriorate its relations with Russia. Some of the early statements by Hungarian officials avoided direct references to Russia (Hettyey, 2023a, p.11; Wachs and Herman, 2014), with PM Orban advocating for a solution to the crisis through negotiations between Russia and the EU (The Hungarian Government, 2014). The government adopted a cooperative strategy on the EU's common position, subscribed to the EU and V4 declarations condemning Russia and supporting Ukraine and pushed for facilitating cooperation with Ukraine (Kreko and Szicherle, 2018; Sadecki, 2014b). Hungary's position was driven by strategic action, as EU-level Ukraine initiatives did not significantly challenge the government's strategic policy objectives.⁵⁶ Minister of State for Foreign Affairs Nemeth underlined the necessity of initiating a political dialogue and restarting talks over Ukraine's EU integration at the FAC meeting in February 2014, while FM Martonyi regularly reiterated support for Ukraine's territorial integrity and urged to facilitate the signing of the AA without delay (Feledy, 2015, pp.73-75). These statements were underpinned by Hungary's swift ratification of the AA and support for the EU's visa-free travel agreement with the country in 2017 (Kreko and Szicherle, 2018).

Moreover, together with Poland and Slovakia, Hungary stepped up its support for Ukraine by transporting gas to the country through reverse flows (Beregovo interconnector) when Russia stopped deliveries in 2014. The Hungarian government briefly suspended reverse flows in September 2014, with PM Orban stating, 'Hungary cannot get into a situation in which, due to the Russian–Ukrainian conflict, it cannot access its required supply of energy' (quoted in

⁵⁶ However, Hungary's lack of direct engagement with other member states regarding the crisis (see Section 5.1.2) and firm position on the minority issue restricted opportunities for strategic learning from other member states.

Feledy, 2015, p.76). However, they resumed in January 2015 (Reuters, 2015) and contributed to ending Ukraine's direct gas imports from Russia. In sum, the EU's common Ukraine policy did not contradict Hungary's strategic policy objectives in the early years following the crisis, which explains the government's cooperative EU-level strategy. Although the Hungarian government attempted to maintain its relations with Russia, it also took steps to support Ukraine's close cooperation with the EU. 'Until 2017, we had okay relations with Ukraine', stated one former senior Hungarian diplomat (Interview 23), adding, 'We were in the European mainstream on Ukraine'. Another Hungarian diplomat (Interview 12) noted: 'We were one of the vocal supporters of both the AA and DCFTA for Ukraine for obvious economic and other reasons. So, we'd love to support Ukraine if they let us support them'. Therefore, Hungary's foreign policy shortly after the crisis may indicate the adaptation outcome of Europeanisation driven by the government's strategic action to align with the EU's common Ukraine policy.

Nevertheless, the empirical evidence shows that the EU's role led to modest changes in Hungarian foreign policy towards Ukraine and reflected the fragmentation outcome of Europeanisation. There were no significant differences between Hungary and the EU; the Hungarian government did not consistently refuse to alter its policy line, and it could not fully shape the EU's common line based on its strategic objectives. These factors exclude the transformation, resistance and no Europeanisation outcomes. Hungary's disagreements with the EU's common line and periodic confrontational statements by the government officials towards Ukraine's cooperation with the EU, however, demonstrate that the EU's influence produced fragmentation rather than adaptation. The main reason for the differences between

Hungary and the EU was that the crisis in Ukraine was not interpreted in national security terms by Hungary, and Ukraine's EU integration was not a priority among Hungarian strategic foreign policy objectives when weighted against the minority issue. Statements by PM Orban and several current and former diplomats made it clear that the safety of Hungarians and the minority issue were the top priorities of the government's policy towards the country, and the size, territory and borders of Ukraine were not that important as long as it was situated between Hungary and Russia (Interviews 22, 23; Kreko and Szicherle, 2018; The Hungarian Government, 2014). A senior Hungarian diplomat (Interview 12) asserted: 'We showed support, but we always had in mind the very specific bilateral issues that centred on the national minority issue of the Hungarian community living in Ukraine, which was very important for us'. PM Orban was also blunt in his position towards Ukraine: 'There should be something between Hungary and Russia – we may even call it Ukraine' (quoted in Kreko and Szicherle, 2018).⁵⁷ The same perception was shared by a former Hungarian diplomat (Interview 19):

For Poland and the Baltic States, what is going on in Ukraine is crucial, because if Ukraine is invaded by Russia, then Russia is at the border gates. For Hungary, it's very good if we have Ukraine between Hungary and Russia. We don't really care very honestly how big that Ukraine is or where the borders are. It just should be somewhere.

Hence, when the developments in Ukraine concerning national minorities began to contradict the government's strategic policy objectives, the signs of fragmentation started to emerge. Even in the early months of the crisis, there were signals that Hungary would continue to view its relations with Ukraine through the lens of the rights of ethnic Hungarians despite its broader alignment with the EU. PM Orban marked the direction of Hungary's foreign policy in

⁵⁷ The statement that the PM would also repeat after Russia's full-scale invasion of Ukraine (Verseck, 2022).

March 2014: 'The most important issue for us in this whole conflict is the safety of the Hungarians, including both the Hungarians living in Hungary and the Hungarians living in Transcarpathia. This is the perspective from which we view the events' (The Hungarian Government, 2014). Further, in May 2014, the PM advocated 'the opportunity for the autonomy' of ethnic Hungarians in Ukraine (Gardner, 2014), the proposition that did not gain traction and was unacceptable for Ukraine (Reuters, 2014b). Thus, despite Hungary's support for EU-level Ukraine initiatives, there were simmering tensions between the countries due to Hungary's concerns that the new Ukrainian government would limit national minority rights in its effort to establish authority over Russian-speaking parts of the country.

Growing prominence of the minority issue

The tensions between Hungary and Ukraine culminated in September 2017 when the Ukrainian Parliament passed an education law mandating the exclusive use of the Ukrainian language in secondary schools (Dunai, 2017). Although the Hungarian government did not abandon its cooperative strategy towards EU-level Ukraine initiatives, the event signified growing fragmentation in the Europeanisation of the country's foreign policy. Bilateral relations significantly deteriorated, with Hungarian MFAT Szijjarto threatening painful consequences for Ukraine, stating that 'Hungary will block all steps within the European Union that would represent a step forward in Ukraine's integration process' (quoted in RFE/RL, 2017) and emphasising that the minority issue was the government's absolute priority in its Ukraine policy over geopolitical considerations (Kentish, 2020). While some other EU members were also dissatisfied with the education law, Hungary's reaction was particularly severe, as the

government was concerned that it would set a precedent and lead to similar legislation in other countries with Hungarian national minorities (Manzinger, 2024, p.141). The law was directed mainly against the usage of the Russian language in education, but ‘Shooting at Russia, they [Ukraine] hit Hungary’ (Tolgyesi, quoted in Bateson, 2019). ‘The Hungarian community became collateral damage to these policies ... The Ukrainian government was never willing to consider Hungarians living in Ukraine either indigenous like the Crimean Tatars or anything else’, stated a senior Hungarian diplomat (Interview 12), adding, ‘And they regarded the Hungarian community as a national security threat, which doesn’t really make sense to me, because what hundred thousand 70-year-old babushkas would do?’

The Hungarian government rejected any meaningful rapprochement with Ukraine until the country restored national minorities’ rights to their pre-2014 status (Interview 22). The rights of the Hungarian minority in Ukraine, together with the energy security issue, were ‘beyond red lines and not negotiable for the Hungarian government’, stated a former Hungarian diplomat (Interview 19), continuing, ‘The Hungarian minority in Transcarpathia might look a minor problem for the EU, but it’s crucial one for Hungary. If they don’t understand it, we’ll always step back into the same river’. ‘We were extremely disappointed with the Ukrainian rhetoric against the Hungarian community ... Some people in the West say that this problem is just a smokescreen, but it’s not true’, concurred another former Hungarian diplomat (Interview 23), noting, ‘It was a real problem because it wasn’t only taking away minority rights but was also humiliating for the Hungarian community, language, culture and history’. In this sense, Hungary’s harsh reaction to the education law was, to an extent, anticipated. ‘We told the Ukrainians that we support your EU and NATO membership. The only thing we ask is don’t

touch the Hungarian minority’, a former senior diplomat (Interview 23) recollected a meeting from February 2014 with the Ukrainian side, adding, ‘And then what they did? They touched it. So, guys, we told you at the first moment what not to do’. Consequently, no other policy issue except minority rights rose to such significance in Hungary’s relations with Ukraine and its position regarding EU-level Ukraine initiatives following 2017.

In response to the education law, the Hungarian government obstructed Ukraine’s cooperation with NATO by blocking high-level meetings of the Ukraine–NATO Commission after 2018 and vetoing the NATO declaration on Ukraine in October 2019 due to the lack of references to the protection of the Hungarian minority in Ukraine (Bateson, 2019; Sadecki and Iwanski, 2018, p.2). It sparked criticism from eleven NATO partners, as they expressed their displeasure at ‘Hungary’s obsession with Ukraine’ (Kreko and Szicherle, 2018), with the US also encouraging Hungary to enable Ukraine’s engagement with NATO (Reuters, 2018). MFAT Szijjarto argued that the decision had nothing to do with geopolitical considerations: ‘This [Hungarian] community is much more important to us than any geopolitical approach’ (quoted in Kentish, 2020). However, PM Orban’s statement ruling out Ukraine’s potential EU and NATO memberships (Kreko, 2018), calls to revise the country’s partnership with the EU and threats to withdraw from the AA with Ukraine (BBC, 2017; Dunai, 2017; RFE/RL, 2017) did not translate into Hungary’s tangible challenge of EU-level Ukraine initiatives until February 2022.

The Hungarian government did not employ a conditional dissent strategy accompanied by hard bargaining tactics and maintained its criticism of Ukraine by making efforts to promote the minority issue at the EU level. During this period, it intended to use the EU’s influence and

cooperation with Ukraine to put pressure on the country to achieve the pre-2014 rights for the Hungarian minority (Interview 22) but could not draw the Union's full attention to the issue (Interviews 2, 6, 8, 19, 23). Thus, the government's objective was not merely to prevent Ukraine's EU integration path but to gain favourable conditions concerning one of its strategic policy objectives. As Ukraine's EU membership was not imminent (Interview 2; see also Chapter 4), and Hungary had already sent a clear message regarding its position by blocking high-level NATO-Ukraine meetings after 2018, it made eminent sense for the Hungarian government to remain cooperative and exercise strategic action. Ukraine made a commitment to abide by the Venice Commission's recommendations to de-escalate bilateral tensions and alleviate Hungary's concerns (Manzinger, 2024, p.141; Sadecki and Iwanski, 2018, p.1). The EU-Ukraine summits in 2018 and 2021 (European Council, 2018a, 2021b) and the EU-Ukraine Association Council meetings in 2017, 2018 and 2020 (European Council 2017, 2018b, 2020) made references to the minority issue and called Ukraine to respect national minority rights according to the CoE Conventions and the Venice Commission recommendations. Nonetheless, these endeavours did not address Hungary's dissatisfaction in a meaningful way. There was a growing frustration in Hungary with Ukraine and the EU's inaction on the issue (Interviews 8, 19, 23). Regarding Ukraine, a former senior Hungarian diplomat (Interview 23) noted the perception of the country's actions among the Hungarian government circles: 'The problem with Ukraine is that they felt they are a great power. We are the power of 50 million people, and you are a small country, just shut up. Basically, that was their approach to Hungary'. Another former Hungarian diplomat (Interview 19) summarised Hungary's view of the EU's handling of the issue:

The European Commission is not dealing with this, and they don't really care about it ... The EU is kind of reluctant to say anything about this ... Minority policies are rather swept under the carpet in the EU because they think member states should deal with these issues alone, and there is no need for a policy at the EU level.

'This was a sad learning process over the years that we cannot expect the EU to do anything for these Hungarian minorities', noted a former policy advisor to the Hungarian government (Interview 8), adding, 'The European Union in the last 20 years didn't want to get involved in this issue and do anything to promote the rights of national minorities'. A former senior Hungarian diplomat (Interview 23) expressed anger towards how the 'liberal Union' accepted Ukraine's education and language laws, stating that outside pressures did not matter for the government: 'I told to my Baltic friends, until the EU doesn't fully support the Hungarian position, no problem, you can jump around ... Now we'll pay back to you [the EU] guys'. Statements from the EU diplomats confirmed the Union's limited involvement and success in addressing the issue until February 2022. One EU diplomat (Interview 6) remarked: 'When Hungarians talk about the issue and rights of Hungarians living in the area, not many people know about Transcarpathia within the EU'. 'We didn't think that this was a wise step from the Ukrainians, although we understood that in terms of the Russian minority, there was a need to do something', stated another EU diplomat (Interview 2), noting, 'We've been trying to mediate without much success until recently. That's a valid point that the Hungarians have, but having said that, I think they care more about the national interest than the interest of the whole EU'.

Although Ukraine's relations with the EU were not significantly hampered, bilateral tensions between Hungary and Ukraine continued after the Venice Commission's opinion on the

education law in December 2017.⁵⁸ The situation escalated after Ukraine's investigation of the high treason of some ethnic Hungarians for receiving Hungarian passports,⁵⁹ resulting in the mutual expulsion of diplomats (Newton, 2018; Talmazan, 2018). The annual Hungarian Standing Conference, a forum for addressing Hungarians' common interests, called for Ukraine to stop the assimilation and harassment of Hungarians in its 2018 and 2019 statements, with PM Orban blaming the country for not keeping its promises (Hettyey, 2023a, p.11). Further, Hungary continued its criticism after Ukraine adopted the Language Law in 2019, which made Ukrainian the only official state language in the country for the first time (Socor, 2020; Warsaw Institute, 2019). The change of government in Ukraine and amendments to the education law based on the Venice Commission's recommendations produced some positive developments in bilateral relations, as the FMs of the two countries met to resolve the dispute and unblock NATO–Ukraine high-level cooperation (RFE/RL, 2020). However, these efforts did not overcome broader differences between the countries. Raids on the Hungarian Cultural Association in Transcarpathia in November 2020 (Euractiv, 2020) and threats against Hungary's diplomatic missions in Ukraine (Reuters, 2021) demonstrated that issues remained far from resolved.

Consequently, the loosely defined nature of the EU's common Ukraine policy and a lack of considerable pressures from the EU level enabled Hungary to persist with its national policies and retain room for manoeuvre in foreign policy. In this way, the Orban government avoided

⁵⁸ The document recognised Ukraine's promotion of the state language as the country's legitimate interest but also noted that the law should not disproportionately hinder the national minorities' existing rights (Council of Europe, 2017; Manzinger, 2024, p.141).

⁵⁹ Dual nationality is not recognised in Ukraine.

formally obstructing EU-level Ukraine initiatives but maintained and prioritised its strategic policy objectives by constantly expressing discontent with Ukraine's actions. Thus, Hungary's occasional obstruction, combined with its harsh statements and threats regarding the EU–Ukraine cooperation, produced a fragmented Europeanisation of its foreign policy between 2014 and February 2022.

5.2.3. Persistent challenge of EU-level initiatives (February 2022–June 2024)

Hungary's foreign policy demonstrated significant divergences from the EU's common Ukraine policy after Russia's full-scale invasion. Except for humanitarian aid, Hungary, in one form or another, opposed EU-level Ukraine initiatives, such as military and financial assistance and the country's EU accession. The Hungarian government did not believe that Ukraine could win the war and viewed the EU's military support for the country as a contributing factor to the war's continuation (Interview 12; Thorpe, 2023). The opposition to the EU's broader policy towards the war and the rights of the ethnic Hungarian minority in Ukraine were increasingly employed by the Hungarian government to delay and block EU-level initiatives in exchange for concessions from the EU.⁶⁰ Hungary's position attracted severe criticism from its western partners, with some EU officials interpreting the country's intransigent position as serving Russia's interests (Moens et al., 2023) and the US ambassador to Budapest describing PM Orban as a leader who 'embraces Putin' (Starcevic, 2023). The government's conditional dissent strategy and unwillingness to alter its strategic policy objectives generated continuous

⁶⁰ This approach was sometimes described as transactional foreign policy (Interviews 7, 9, 16; see also Szelenyi, 2024, p.65), with Hungary's position and objectives becoming blurry with the passage of time (Interview 14).

diplomatic spats with the EU and other member states. This was accompanied by hostage-taking and led to the resistance outcome of Europeanisation as a result of Hungary's consistent contestation of most of the EU-level Ukraine initiatives.

Scepticism towards EU diplomacy and military solution

The Hungarian government did not immediately employ a conditional dissent strategy at the beginning of Russia's full-scale invasion. However, it remained sceptical of Ukraine's eventual victory and a military solution to the conflict, in contrast to the EU's commitment to supporting the country for as long as it takes. 'This isn't our war, we have to stay out of it', underlined PM Orban (quoted in Euronews, 2022a), expressing a potential danger that Hungary could become a military target in the war. 'If you look at the deeds, we are 95% similar to other EU and NATO members. However, we don't think that prolonging the fighting will help Ukraine in the long run', noted a senior Hungarian diplomat (Interview 12), adding, 'They should stop killing each other and have talks to find out how they are going to coexist in future. This doesn't mean Russia keeps all the territories it occupies because we cannot support a change of borders by force'. One former senior Hungarian diplomat (Interview 23) emphasised Hungary's efforts to explain Russia's gradually strengthening negotiating position to European partners after the autumn of 2022 and remarked that it would be in the interests of the EU and Ukraine to 'end or at least freeze the conflict'. A former senior Hungarian official (Interview 30) noted: 'The longer this war drags on, the smaller Ukraine will be. It isn't a morally right thing to push the Ukrainians to fight Russia to give Europe time to rearm. The cost of that is Ukrainian blood'. A former policy advisor to the Hungarian government (Interview 8) described the EU's common

Ukraine policy as being based on ‘severe miscalculations’. Therefore, statements from various government officials demonstrate emerging differences between Hungary’s strategic objectives and the EU’s common Ukraine policy, even though the Hungarian government was initially cooperative.

Hungary’s policy considerations were heavily influenced by the issue of the rights of the ethnic Hungarian minority (see Sections 3.2, 5.2.1 and 5.2.2). The Hungarian government did not allow the transit of lethal weapons for Ukraine through the Hungarian territory over concerns about their security (Bayer, 2022a). The initial steps and statements pointed towards impending challenges in reconciling Hungary’s and the EU’s divergent Ukraine policies. ‘We really started up on the wrong foot when it comes to Ukraine’ highlighted a senior Hungarian diplomat (Interview 12), with a former senior diplomat (Interview 23) noting, ‘The sympathy is more limited than other countries because we saw what Ukraine was doing to our people, these laws [education and language] were bad, and Ukraine wasn’t listening to our position until the war started’. Thus, although Hungary promised to deliver humanitarian assistance to Ukraine and helped Ukrainian refugees,⁶¹ there were significant incompatibilities between its national position and the EU’s Ukraine-related initiatives during the February 2022–June 2024 period.

⁶¹ The Hungarian government and non-governmental organisations such as the Hungarian Red Cross, Hungarian Interchurch Aid (HIA) and International Organisation for Migration’s (IOM) Hungary office provided food, shelter, healthcare, education and other essential and immediate support to Ukraine and approximately 60 thousand Ukrainian refugees in Hungary (see About Hungary, 2022; HIA 2024; IOM Hungary, 2024).

After the early phase of Russia's invasion, the Hungarian government's scepticism about the military solution to the conflict led to its outright challenge of the majority of the EU's Ukraine-related initiatives. Hungary was vehemently against providing any weapons to Ukraine and refused to participate in the EUMAM using constructive abstention in October 2022 (Ory, 2022). Moreover, despite its early support for the EPF, the country opted against allocating its contribution for arming Ukraine and decided to provide support for Chad (About Hungary, 2024a; Shevko, 2024). The elements of the government's conditional dissent strategy and hard bargaining tactics became evident when Hungary blocked the EPF reimbursements to member states after 2023 for various reasons. The government initially justified the decision due to Ukraine's inclusion of the Hungarian OTP bank in the 'war sponsors' list (About Hungary, 2023a). However, even after the bank was removed from the list, Hungary kept vetoing reimbursements due to Ukraine's discrimination against Hungarian companies, leading to criticism from fellow member states that the country was shifting the goalposts (Barigazzi, 2024b; Euractiv, 2024b).⁶² The EU exploited a legal loophole to bypass Hungary's opposition to sending military support to Ukraine from Russia's immobilised central bank assets, citing the country's constructive abstention in the creation of the UAF (Balazs, 2024). However, the government's position hardly changed. A senior Hungarian diplomat (Interview 12) noted that the EU cannot win the war with its current strategy, while PM Orban criticised the EU's military support for Ukraine by stating that it 'prolongs the agony' of the country (quoted in Thorpe, 2023). The empirical evidence demonstrates the continuous tensions between Hungary's policy preferences and the EU's common Ukraine policy, indicating the EU's limited influence

⁶² Hungary's veto on reimbursements could not be overcome, resulting in a €6.6 billion backlog of payments to member states as of June 2024 (see Liboreiro and Tidey, 2024).

on Hungarian foreign policy and the resistance outcome of Europeanisation. The Hungarian government's opposition to EU-level Ukraine initiatives limited its cooperation with fellow EU member states, resulting in little room for cross-loading. Changes in Hungary's foreign policy primarily happened through downloading from the EU level, often following intense negotiations and bargaining.

Divergent national priorities and growing discontent

The Hungarian government particularly toughened up its position after its expectations to secure the release of the pandemic recovery grants under the Recovery and Resilience Facility (RRF) in exchange for supporting sanctions were not realised (Szabo and Panyi, 2022). The Commission had triggered the conditionality mechanism (established in 2020) against Hungary over the rule-of-law concerns in April 2022, aiming to suspend €7.5 billion in EU cohesion funds after the government's failure to undertake necessary reforms (Council of the EU, 2022e). Along with the minority issue in Ukraine, the government's broader opposition to the EU's common decisions began to be increasingly reflected in its attempts to achieve the release of Hungary's frozen funds by employing a conditional dissent strategy and hostage-taking. While conditional dissent was not designed to completely block EU-level Ukraine initiatives, the government prioritised securing favourable deals in the form of concessions in most areas of its strategic objectives before formally backing these initiatives.

Hungary's hardline position on Ukraine-related EU decisions was perceived as a blackmail tactic by several member states and EU diplomats, with German FM Baerbock urging the

country to refrain from using financial aid for Ukraine to settle the rule-of-law dispute with the EU (Tamma and Bayer, 2022; von der Burchard, 2022; see also Joyner, 2022). An EU diplomat (Interview 6) interpreted Hungary's strategy as power projection to consolidate domestic audiences and an attempt to extract money from the EU: 'As the importance of Ukraine grew in the EU agenda, it became even more prestigious to talk about it and use it for political gain. I think the Hungarian case shows that.' Commenting on Hungary's approach to EU-level Ukraine initiatives, a former Hungarian diplomat (Interview 19) stated:

If you are doing this, then we can also get something like a cheap bargain. So, of course, it [Hungary's support for the EU policies in exchange for the release of frozen funds] can be related. But I don't think that if they release the money, Hungary's policy towards Ukraine will change.

Another former senior Hungarian diplomat (Interview 23) underlined the government's strategy to extract money from the EU and added: 'The government isn't going for popularity ... Maybe it sounds cynical, but actually it doesn't really hurt Ukraine. What is hurting Ukraine? The continuation of this war!'. The Hungarian government's opposition was more firmly expressed regarding Ukraine's EU accession and the EU's financial assistance to the country. These areas demonstrated fundamental differences between Hungary's and the EU's policy positions, generating considerable EU-level pressures on Hungary to alter its stance and unblock the EU-level agreements. While in some instances, such as the government's constructive abstention from the EUMAM and the EU's workaround to bypass Hungary's veto on using Russian central bank assets to arm Ukraine, Hungary's opposition could be overcome, in the aforementioned cases, the government increasingly resorted to hostage-taking to attain its strategic objectives.

The Hungarian government opposed the EU's proposed €18 billion in assistance for Ukraine through the MFA+ instrument and joint borrowing mechanism for 2023. The EU's freezing and blocking of Hungary's RRF and cohesion funds provided an opportunity for the government to resort to hostage-taking. Hungary rejected the plan in November 2022 and advocated bilateral support (Hungary Today, 2022d; Reuters, 2022c). The government's concern was that a loan to Ukraine, backed by the EU budget as a debt instrument, could prevent unused funds from the EU budget (including frozen and blocked EU funds to Hungary) from being redistributed among member states (Orban, 2022). One former senior Hungarian official (Interview 30) explained that common debt was seen as a way to strengthen the Brussels bureaucracy by taking away power from national capitals, thereby undermining Hungary's sovereigntist stance against a federal Europe. Several current and former Hungarian diplomats underlined the opportunity of connecting the EU's financial assistance to Ukraine with the release of Hungary's EU funds and emphasised the unlikelihood of any fundamental changes in the country's position even if the EU agreed to release the funds (Interviews 12, 19, 23). In its official statements, the Hungarian government denied the connection between the issues (Orban, 2022), with the government spokesperson Kovacs describing it as a 'dangerous precedent' (Strupczewski and Baczynska, 2022). However, EU institutions and other member states perceived the country's policy position and intention to use its veto power as a blackmail tactic, hostage diplomacy and power projection (Tamma, 2022b; Tamma and Bayer, 2022; von der Burchard, 2022; also Interview 6). Hungary's initial contentious stance in the form of veto threats and delaying tactics was followed by its unilateral linkage of the two issues in the further stages of negotiations, which reflected a standard hostage-taking practice.

EU member states responded to Hungary's initial veto and hostage-taking by removing any decision on the release of the EU's funds for Hungary from the agenda of the meeting of finance and economics ministers in early December 2022 (Strupczewski and Baczynska, 2022). However, the Hungarian government ultimately dropped its veto in the December 2022 Council meeting after member states approved the country's €5.8 billion in RRF funds and reduced its suspended cohesion funds to €6.3 billion. Twelve member states, including France and Germany, worked to convince the Commission that Hungary made enough progress on the rule-of-law issue to release a part of the suspended cohesion funds (Tamma, 2022b). PM Orban's statements (Orban, 2022) summarised the main elements of Hungary's conditional dissent strategy, which was based on securing favourable deals rather than outright blocking the agreement:

We agreed to this because we were left on our own; and in my experience, when we're left on our own we should only block European measures as a last resort. If a compromise – good or bad – can be reached, then in the interests of unity it's worth yielding or reaching an agreement.

Despite lacking significant political and economic power within the EU and being the only country to oppose the agreement, Hungary succeeded in its hostage-taking tactic. The government's accomplishment was predominantly related to the urgency of the agreement for the EU's common Ukraine policy, as the failure to reach a consensus would require a lengthy process of raising funds through individual guarantees outside the EU, which might strip Ukraine of significant financial support for 2023 (Strupczewski and Baczynska, 2022). Simultaneously, time and EU pressures prevented the Hungarian government from driving an even harder bargain, given that Hungary would lose 70% of the RRF funding without a deal by the end of 2022 (Tamma, 2022c). Unlike a soft bargaining tactic, the government used its veto

power as a pressure tactic to extract concessions from the EU. Europeanisation was in the form of resistance, as the Hungarian government did not alter its strategic policy objectives, remaining at odds with and criticising the EU's common position. Despite member states' involvement in the release of the EU funds, the Hungarian government did not actively engage in policy transfers or learning from them and effectively took a defensive position. Hence, Europeanisation happened through downloading, with Hungary changing its policy position after the common agreement was reached at the EU level.

Hungary also opposed the EU's ATMs, which enabled Ukraine to export its agricultural products through member states without import duties, quotas and trade defence measures. Despite the Commission's warnings, the government, together with Bulgaria, Poland, Romania and Slovakia, proceeded with the national ban on imports of Ukrainian agricultural goods in April 2023, citing unfair competition and a lack of EU measures to prevent the damage to the Union's internal market (Knight and Hallam, 2023). While the agreement with the Commission on the temporary restriction of imports provided a short-term solution (Kijewski and Brzezinski, 2023), the Commission's decision to lift the ban led to Hungary's another unilateral action to bar Ukrainian agricultural imports in September 2023. PM Orban accused the EU of deceiving Hungary and flooding the domestic market with cheap grain instead of sending it to African countries (Euronews, 2023a). In this sense, the PM remained adamant about maintaining the ban, as the EU's efforts to address the issue did not bring any tangible results by the summer of 2024 (European Council, 2024b; Orban, 2024). Although hostage-taking was not possible due to trade being the Commission's competence and a lack of unanimous

decision-making, the empirical evidence showcases the government's conditional dissent strategy and the elements of the resistance outcome of Europeanisation.

Opposition to Ukraine's EU accession and Ukraine Facility

Hungary's contestation of the EU's common Ukraine policies was also visible in the government's opposition to Ukraine's EU accession and the Ukraine Facility. When the Council decided on Ukraine's candidate status on 23 June 2022, Hungary did not block the agreement and showed solidarity with other EU member states. PM Orban's expression of support for Ukraine initially suggested Hungary's cooperative stance on the issue (Hungary Today, 2022c). However, despite its initial backing, Hungary started to openly challenge Ukraine's potential EU accession from 2023. Although Ukraine expressed readiness to make amendments to the education law, Hungary's opposition remained the primary obstacle to the EU's anticipated decision to begin accession talks (Baczynska and Gray; Hall, 2023). Stating that there was no 'insurmountable desire' in the Hungarian parliament to support Ukraine's EU membership, the PM cast doubt on the country's accession while at war and underlined that Hungary could not support Ukraine in the international arena until the rights of the ethnic Hungarian minority were guaranteed (Euronews, 2023b; Gyori and Than, 2023; see also Khvostova and Kryvosheiev, 2023). The Commission's long-awaited recommendation on Ukraine's accession process and its proposal of a €50 billion Ukraine Facility from the EU budget rendered the December 2023 Council meeting extremely critical, as both issues required the unanimous approval of member states.

Hungary's demands before the December 2023 Council summit were unclear and sometimes contradictory. Before the meeting, the Hungarian government questioned the objective and merit-based character of the EU's enlargement policy and expressed its discontent with the 'unsubstantiated, unbalanced and unrealistic' nature of the proposed Ukraine Facility (Politico, 2023a, 2023b; Vinocur, 2023; also Interviews 8, 12). Following the Commission's recommendation to open accession talks with Ukraine in November 2023, Hungary demanded a strategic discussion of the EU's Ukraine policy before advancing the accession process and aid to Ukraine, urging the Council President Michel to delay the final decision on both issues (Politico, 2023b; Vinocur, 2023). 'The European Commission put forward the report, which said that Ukraine didn't fulfil four out of seven necessary criteria to start negotiations', remarked a senior Hungarian diplomat (Interview 12), arguing that the Commission violated the Treaty of the EU by proposing to start accession talks. A former advisor to the Hungarian government (Interview 8) characterised the opening of accession talks with Ukraine as hypocritical and irresponsible: 'They'll never be an actual member, and even if they become, it will be 10–15 years from now ... We're just opening accession talks, and not actually giving membership just made the whole thing even more ridiculous'. Further, the leaked document revealed Hungary's proposal for a mid-term review of the Ukraine Facility by the unanimous Council decision in 2025 and a demand that allocated resources for Ukraine not exceed 50% until the review takes place (Politico, 2023a). It would have effectively given Hungary a veto right for the EU's support for Ukraine midway through if the government deemed it necessary. The proposed revision of the EU's 2021–2027 budget, required for allocating money to the Ukraine Facility, had also been rejected by PM Orban in the October Council meeting, who argued that the EU's strategy to provide financial and military support for Ukraine had already failed (RFE/RL, 2023).

Ahead of the December 2023 Council meeting, the minority issue took a back seat,⁶³ as the main discussions concentrated on the EU's potential release of Hungary's frozen cohesion funds. PM Orban and several Hungarian officials denied any link between the issues, describing it as 'pressure from the EU', a 'twisted logic' and 'blackmail against Hungary' (Brzozowski, 2023c; Foy and Dunai, 2023; Foy, Hall and Dunai, 2023; Vela, 2023a). Simultaneously, however, a non-binding public consultation in Hungary asked voters if the two issues should be linked (Dunai and Dubois, 2023). Together with a statement from the PM's Political Director Balazs Orban that they could become linked 'if the EU insists', this reinforced the conviction within the EU and among member states that Hungary aimed to extract concessions from the EU (Simon and Mathieson, 2023; Vela and Sheftalovich, 2023; Vinocur, 2023). Despite denials from various Hungarian government officials, these actions were perceived as part of Hungary's hostage-taking, with the EU and other member state officials noting Hungary's objective to achieve the release of the frozen cohesion funds (Brzozowski, 2023c; Foy, Hall and Dunai, 2023). The statements of resolve and commitment to maintaining the national position and high initial demands (Foy and Dunai, 2023; Vela, 2023a) indicated hostage-taking and reflected Hungary's conditional dissent strategy (see Chapter 2). Thus, Hungary's tactic was different from soft bargaining, since the government's uncompromising posture entailed veto threats and delays from the very beginning.

⁶³ Ukraine passed an amendment restoring the rights of national minorities in education following the Venice Commission's recommendations, which addressed many of Hungary's demands (Bozso, Nagy and Horvath, 2023). Since 2017, the Venice Commission's recommendations on Ukraine's education and language laws, have, *inter alia*, included addressing the discriminatory treatment of minority languages, ensuring their use in education at primary and secondary schools, revising the language law to comply with international commitments and eliminating differential treatment between languages (see HHRF, 2023 for the Hungarian perspective).

Ultimately, PM Orban constructively abstained from the December 2023 Council vote on Ukraine's accession by taking a 'coffee break' only after the EU's release of €10.2 billion in frozen cohesion funds for Hungary paved the way for the common agreement. Depicting it as a blackmail negotiation, a senior EU diplomat (Interview 2) drew attention to the EP's lawsuit against the Commission over the release of funds without disclosing the relation between the issues. The most important revelation came from the Commission VP Schinas, who hinted at the Council's involvement (quoted in Wax, 2024):

We still have blocked money [destined for Hungary] but clearly – and this is not the Commission – when we had to discuss the money for Ukraine, there was a broader deal ... The €50 billion deal for Ukraine was agreed at the European Council.

For his part, PM Orban stated that after his efforts to dissuade fellow leaders from starting accession talks, he agreed to the process as Hungary would have further opportunities to block it in the future (Dunai, 2023b). The developments provide circumstantial evidence of a link between the two agreements. Despite struggling to prove the proposed initiatives' impact on its strategic objectives to EU partners, its isolated position and weak political and economic power, the Hungarian government achieved its desired goal in exchange for supporting the EU's common position. Similar to the December 2022 Council meeting, the significance and urgency of the issue for the EU's common policy helped Hungary with hostage-taking. Although Hungary's constructive abstention may suggest that the EU's impact resulted in no Europeanisation, the government's decision to drop initial opposition by abstaining from the vote demonstrated its changing stance on the issue. Therefore, even though changes in Hungary's foreign policy were modest, Europeanisation happened and reflected the resistance outcome due to the government's continuing contestation of EU-level Ukraine initiatives.

Despite voting for the start of the accession talks, PM Orban vetoed the EU's €50 billion Ukraine Facility, delaying the agreement and endangering the EU's long-term financial support for Ukraine. The PM put forward conditions for Hungary's formal support, which included a more moderate support package, funding outside the EU budget, the year-by-year approval of financial aid (i.e., an annual veto right) and the exclusion of Hungary from any new joint EU borrowing (Foy et al., 2024; Dunai, 2023b). This demonstrated the government's conditional dissent strategy, as it sought to accommodate some of its strategic objectives within the agreement. PM Orban insisted on the government's firm position (Dunai, 2023b), with several diplomats noting the irrelevance of reputational costs and peer pressures in the country's foreign policy-making (Interviews 12, 23; see also Hall, Dunai and Foy, 2024), which denoted Hungary's prioritisation of its strategic policy objectives over normative and ideational factors. However, the importance of the Ukraine Facility for the EU's common position, combined with Hungary's attempt to exploit the unanimity principle after already securing concessions, significantly limited the government's room for manoeuvre. This led to considerations of the Article 7 procedure and substantial economic measures against the country by the EU and member states (Foy, Bounds and Dunai, 2024; Sorgi, 2024).

The EU and member states did not bow to Hungary's far-reaching demands this time. Instead, they offered a compromise that would only allow an annual debate on the implementation of the aid package, with a review possible after two years, requiring the agreement of all rather than just one member state as proposed by Hungary (Brzozowski, 2024a; Foy, 2024a; Foy et al., 2024). Hungary had no choice but to vote for the EU's financial aid under immense pressure

at the EU summit on 1 February 2024. It was a failure for Hungary considering the government's previously uncompromising stance, as PM Orban used much of his leverage in the December meeting to gain concessions and 'run out of road when it comes to holding the EU hostage' (Sorgi, 2024). However, the PM and his Political Director Balazs Orban declared victory even though their demands did not materialise, arguing that Hungary achieved to attach control mechanisms to the Ukraine Facility and 'prevented Brussels from taking Hungary's money and sending it to Ukraine' (Kovacs, 2024a; Orban, 2024a). Consequently, Hungary's conditional dissent strategy through hostage-taking resulted in the resistance outcome of Europeanisation, with the country being forced to alter its foreign policy position despite its continuous contestation of EU-level Ukraine initiatives.

Increasing pressure from western partners

The Hungarian government's unyielding negotiation strategy towards EU-level Ukraine initiatives isolated the country within western institutions and increased pressures from western partners to alter its policy course. The country's EU minister Boka acknowledged that it was not a favourable position but added that isolation would not stop Hungary from resolutely defending its national interests within the EU (Hall, Dunai and Foy, 2024). Hungary's traditional V4 partners were also critical of its stance, which strained foreign policy cooperation within the group (Scally, 2022; Zachova, 2022; see also Dunai, Fleming and Bounds, 2022; Jack, 2022b).⁶⁴ One Hungarian policy expert (Interview 16) defined PM Orban's

⁶⁴ While Fico's election victory in Slovakia seemed to gain Hungary an ally, the PM also expressed support for Ukraine and aimed to strengthen relations with the country despite his close relations with Russia (see Haughton et al., 2024; Minder and Olearchyk, 2024; Terenzani, 2024). In Poland, PO's election victory prompted increased

strategy as ‘high-risk and high-reward without many visible rewards’, while some policy experts and former diplomats (Interviews 9, 14, 23) questioned the usefulness of the government’s diplomatic style and unnecessary escalation tactics. A former Hungarian diplomat (Interview 14) explained that decision-making should follow an escalation ladder, starting with minor steps and building up, which was not the case in Hungary, where the opaque decision-making was understood only by the PM’s close circle.

External pressures were sometimes seen as hypocritical, a blackmail tactic and an anti-Hungarian campaign (Interviews 8, 22). At the same time, Hungarian diplomats acknowledged the limits of the country’s tough negotiation strategy, which indicated the government’s conditional dissent strategy and eventual readiness to accept the EU’s common line once its key priorities were accommodated. In this context, summarising the role of external pressures, one senior Hungarian diplomat (Interview 12) stated: ‘There was enormous political pressure and will to move ahead ... If Europe wants to commit collective suicide, we have warned them. But if that’s the majority opinion, what can you do about it?’. A former senior Hungarian diplomat (Interview 23) struck the same tone:

There is more and more pressure on Hungary. So, from time to time, you have to withdraw from the fight because they [the EU] are bigger, it’s a one-sided relationship ... It’s not easy, but there are some places the Hungarian government chooses to fight.

The urgency of the decisions on Ukraine’s EU accession and the EU’s financial aid to the country significantly increased diplomatic pressures on the Hungarian government.⁶⁵ However,

criticism from the new government, with PM Tusk describing Hungary’s Ukraine policies as ‘strange and egoistic’ and denouncing ‘Orban fatigue’ (quoted in Bayer, 2024).

⁶⁵ Although Hungary also blocked the EPF reimbursements to member states and was criticised for its uncooperative behaviour, the issue was not as urgent since the country’s position did not considerably hinder the EU’s military support for Ukraine.

pressures without tangible political and economic costs did not have a serious impact on Hungary's policy position (also Interviews 12, 23). 'There is no country or leader in the EU with decisive influence over Orban's position', remarked a former senior Hungarian diplomat (Interview 28), adding, 'Only extremely tough measures have an effect. Orban is a so-called 'strong man' who only respects power. He views European leaders as cowardly and weak, with no fear of them'. Ultimately, the EU floated an idea of suspending Hungary's voting rights through the Article 7 procedure and considered heavy economic measures against Hungarian economy in case the government blocked the financial aid for Ukraine (Foy, Bounds and Dunai, 2024; Hall, Dunai and Foy, 2024), while some EU leaders simultaneously favoured using diplomatic channels to persuade PM Orban (Euractiv, 2023; Moens et al., 2023, 2024). As a result, the government's hostage-taking gradually became untenable because, unlike in the previous instances, the EU and other member states were prepared to deploy extreme measures to unblock the agreement before the February 2024 Council meeting. This exposed Hungary's weak relative power in a one-sided relationship with the EU (Interviews 23, 28) and forced the government to drop its veto without gaining the desired concessions (Foy et al., 2024). Thus, a change in Hungary's foreign policy position happened only after significant EU-level pressures.

Nonetheless, changes in Hungary's foreign policy position did not lead to changes in the government's strategic policy objectives, as the country continued to contest EU-level policies towards the war, which signified the resistance outcome of Europeanisation. A Hungarian policy expert (Interview 9) noted that although PM Orban can sometimes be won over on certain issues through close personal relationships, he is generally difficult to persuade in

foreign policy due to his strong views and reluctance to follow the mainstream. 'The EU money can change the Hungarian position, even that is not 100%', added a former senior Hungarian diplomat (Interview 23), noting, 'Reputational costs and peer pressure do not really matter in our system ... Decisions are made by PM Orban and his close circle'. On the same topic, one senior Hungarian diplomat (Interview 12) admitted that there are ways to overcome differences with the EU: 'We are not suicidal, for sure. There are ways this [agreement] could be done ... but we don't think that solidarity can be enforced, because it's voluntary'. Therefore, the involvement of the French, German and Italian leaders in negotiations prior to the February 2024 Council summit (Foy et al., 2024) did not result in strategic learning from these countries because Hungary's strategy aimed to defend its national policy position until the desired concessions could be gained. Thus, Europeanisation of the country's foreign policy happened through forced downloading due to EU-level pressures rather than cross-loading through bilateral exchanges or policy transfers from other member states.

The US also expressed its disappointment with Hungary's Ukraine policy, with ambassador Pressman underlining Hungary's lack of engagement with the US on vital national security issues (Brzozowski, 2024a; Hall, Dunai and Foy, 2024).⁶⁶ However, the criticism and pressure from the US did not translate into economic measures, and the government mainly ignored the US's role in EU-related issues (Interviews 12, 23). The Orban government's distant and sour relations with the Biden administration and close affinity with former President Trump limited the impact of the US pressure and criticism regarding Hungary's Ukraine policy (Interviews 16,

⁶⁶ The Hungarian government at times perceived EU-level policies as following the US national interests (Interviews 16, 22).

23; see also Section 5.1.3). 'We are at odds with the Biden administration because of political reasons', remarked a senior Hungarian diplomat (Interview 12), adding, 'So, we have cast our vote or put our bets in the US presidential election. We'll see what comes out of that'. For its part, Hungary considered NATO mainly as a military organisation whose influence on political and economic matters was limited (Interview 12). Thus, pressures from the EU and fellow member states were the main determinant of changes (albeit not significant) in Hungary's foreign policy, with the roles of the US and NATO being negligible in influencing the country's position on Ukraine-related initiatives.

5.3. Summary

The Hungarian government adopted a cooperative strategy towards EU-level Russia and Ukraine initiatives from 2014 to February 2022. Hungary's early reaction to the 2014 crisis was concomitant with the EU mainstream. However, the government attempted to maintain its strategic policy objectives and began to rhetorically challenge the EU policies when the EU's common Russia policy and the minority issue in Ukraine contrasted with them. The indecisiveness of the EU's common policy meant that Hungary could uphold its national position without considerable pressures from EU institutions and other member states. In this context, Europeanisation happened through downloading, as Hungary's strategic action involved subscribing to most EU-level initiatives on Russia and Ukraine that aligned with its strategic objectives, while also pursuing policies that opposed the EU's common line when its

national objectives were challenged, leading to modest changes and the fragmentation outcome of Europeanisation.

Throughout the February 2022–June 2024 period, the Hungarian government considered EU-level policy initiatives towards Russia and Ukraine largely contrary to its strategic objectives. They were regarded as one of the contributing factors to the war's continuation and were consistently challenged by Hungary even in areas that did not require a unanimous CFSP agreement. In addition to its strong opposition to Russia sanctions, Ukraine's EU accession and financial assistance to the country, the Orban government continued diplomatic and energy cooperation with Russia, blocked the EPF reimbursements to member states and unilaterally banned certain Ukrainian agricultural imports despite the EU's Solidarity Lanes and ATMs. Hungary also constructively abstained from the EUMAM and the UAF, which sought to provide military support for Ukraine. These actions demonstrated the main aspects of the Hungarian government's conditional dissent strategy and hostage-taking. They led to modest changes in Hungary's foreign policy and resulted in the resistance outcome of Europeanisation, which was characterised by significant differences between the national and EU-level policies.

Period	Hungary's strategic policy objectives	EU-level initiatives	Strategies	Dimensions	Mechanisms	Outcomes
2014–February 2022	Russia: voice verbal opposition to EU sanctions; prioritise economy-driven foreign policy towards Russia Ukraine: protect the rights of the Hungarian minority	Russia: Weak EU diplomatic response (the Normandy Format and the Minsk agreements), inadequate sanctions regime and ineffective common energy policy Ukraine: EU diplomatic support; V4 declarations; AA and DCFTA; the EUAM; support for Ukraine's energy independence	Cooperative	Downloading	Strategic action	Fragmentation
2022–June 2024	Russia: maintain bilateral ties; resist EU sanctions and energy decoupling from Russia; prioritise ceasefire and negotiations Ukraine: gain concessions from Ukraine regarding the minority rights; oppose the EU's foreign policy towards the war and Ukraine (including Ukraine's EU candidacy and financial support) to achieve concessions from the EU	Russia: Fourteen sanction packages, including in the energy area; elimination of energy imports from Russia diplomatic isolation of Russia Ukraine: EU candidate status and clear membership perspective; extensive military support (EPF, EUMAM, the Czech initiative, Ukraine Facility); financial (ATMs; MFA, Ukraine Facility) and humanitarian assistance (TPD)	Conditional dissent	Downloading	Hostage-taking	Resistance

TABLE 4. Europeanisation of Hungary's foreign policy, 2014–2024

Taken together, the Hungarian case illustrated the explanatory value of the Europeanisation framework developed in Chapter 2. It shows how variation in EU-level pressures interacted with the Hungarian government's strategic policy objectives, shaping the strategies it adopted, and, in turn, the mechanisms through which the EU's influence translated into national foreign

policy change. When EU-level initiatives were less coherent and there was little pressure on Hungary between 2014 and February 2022, the government's cooperative strategy enabled selective compliance and resulted in the fragmentation outcome of Europeanisation. As EU-level initiatives became more consolidated after February 2022, the government increasingly relied on the conditional dissent strategy and hostage-taking, leading to the resistance outcome of Europeanisation. The case therefore demonstrated that Europeanisation in foreign policy is contingent on the interaction between EU-level initiatives and a government's strategic policy objectives and strategies for implementing these objectives, which determine the mechanisms of change and the resulting Europeanisation outcomes.

6. EUROPEANISATION OF POLISH FOREIGN POLICY

This chapter investigates Polish foreign policy towards Russia and Ukraine between 2014 and June 2024 based on the Europeanisation model outlined in the second chapter. Section 6.1. explores the EU's role in Polish foreign policy towards Russia. It starts by introducing the key elements influencing the PO and PiS governments' Russia strategies. Section 6.1.2. analyses the adaptation of Polish foreign policy to less ambitious EU-level initiatives towards Russia during the 2014–February 2022 period, while Section 6.1.3. examines minimal adaptation in the country's foreign policy in the light of the EU's more resolute response to Russia between February 2022 and June. 2024. The chapter moves to discuss the EU's influence on Polish foreign policy towards Ukraine in Section 6.2. Here, Section 6.2.1. presents the main factors shaping the PO and PiS governments' strategies towards Ukraine. Afterwards, Section 6.2.2. demonstrates Poland's adaptation to the EU's still cautious policy line towards Ukraine during the 2014–February 2022 period, while section 6.2.3. reveals the country's alignment with EU-level Ukraine initiatives and the limited adaptation outcome of Europeanisation between February 2022 and June 2024.

From a conceptual perspective, the chapter employs the Europeanisation framework developed in Chapter 2 to examine how EU-level foreign policy initiatives interacted with Polish governments' strategic policy objectives over time to produce changes in the country's national foreign policy. It focuses on how these interactions shaped the mechanisms through which the EU's influence translated into national foreign policy change. The Polish case is particularly instructive because the core foreign policy objectives of both Polish governments

towards Russia and Ukraine largely aligned with EU-level initiatives across the period under study. Consequently, the analysis points primarily to cooperative strategies and adaptation outcomes, while still allowing for variation in the degree and scope of change across the two periods and key issue areas (see Table 5). By distinguishing between phases of relatively weaker (2014–February 2022) and more resolute EU action (February 2022–June 2024), the chapter captures within-case variation and assesses how even high preference congruence can generate Europeanisation.

6.1. Polish foreign policy towards Russia

6.1.1. Poland's strategic policy objectives towards Russia

Poland has advocated a more resolute common Russia policy since becoming an EU member state, earning itself the name of 'the New Cold-warrior' (Leonard and Popescu, 2007, p.48). Compared with Germany's historical Russia-first policy, the country has always prioritised Ukraine and pursued a Ukraine-first objective in its Eastern policy (Interview 4; see also Bottger, 2019, p.45; Nitoiu, 2016, p.378; Youngs, 2009b, p.361). Poland's strategic policy objectives have focused on diplomatically and militarily deterring Russia, pushing for tougher EU diplomacy and sanctions and reducing dependence on Russian energy supplies since 2014. The primary objective has been directed towards achieving Russia's strategic defeat in Ukraine since February 2022 (PAP, 2023). There has been a wide consensus among the mainstream political parties around the main elements of Poland's strategic objectives towards Russia

(Interviews 20, 26, 27, 29). However, they have diverged regarding the ways to achieve the country's policy objectives. Hence, considering two government changes (2015 and 2023) in Poland between 2014 and June 2024, it is essential to briefly outline the two main political parties' foreign policy strategies and their effects on Poland's Russia policy before examining Europeanisation.

PO has seen the EU as an integral part of Poland's foreign policy and argued that the country's strategic policy objectives could be more effectively accomplished through strong collaboration with the Union (Interviews 15, 20, 25). The Tusk government has consistently pursued a policy of close coordination with Germany and France through the Weimar Triangle, thereby putting Poland at the centre of EU foreign policy-making (Barbiere et al., 2014; Czulno, 2022; Foy, 2024b; Haughton et al., 2024; Zajackowski, 2017, p.193, 212). Unsurprisingly, after returning to power in 2023, the PO government has aimed to mobilise the EU's response to Russia through Paris, Berlin and Warsaw by revitalising the Weimar Triangle and to strengthen the EU's foreign policy by 'speaking and acting with one voice' (Alipour, 2024; see also Foy, 2024d). A senior EU diplomat (Interview 7) drew a comparison between the PO government's policy-making style and the previous PiS government:

If you compare the former Polish COREPER II ambassador [Andrzej Sados] and his staff with the current one [Piotr Serafin]⁶⁷, who is Tusk's close ally and was his chief of staff when he was the Council President, these people are pro-Europeans ... The overall shift in the pro-European stance of actors provides a significant change in the overall decision-making in Brussels.

⁶⁷ Currently an EU Commissioner for Budget, Anti-Fraud and Public Administration.

Nevertheless, PO has not subscribed to the EU's policies in every area contrary to the criticism by PiS (Interview 7).⁶⁸ Hence, rather than fundamentally redefining Poland's national interests, PO has maintained that the country's EU strategy and Russia policy could be more effectively attained by aligning with the EU mainstream.

PiS did not alter Poland's strategic objectives towards Russia after its victory in the 2015 election. However, its emphasis on protecting sovereignty and national interests worsened Poland's relations with the EU and constrained its coalition-building potential with the main drivers (Germany and France) of the EU's Russia policy (Interviews 1, 15; see also Buras, 2017). Although PiS did not want to leave the EU, it considered that the Union's current state clashed with Poland's independence, national interests, identity, traditional values and Christian conservatism (Balcer et al., 2016, p.7; Cadier and Szulecki, 2020; Zwolski, 2017). The ideological divergence prompted the government to regard the influence of the EU and western Europe as a threat to Polish interests and values (Buras, 2017, p.3). Even after Russia's full-scale invasion of Ukraine, the party's stance did not change, as an influential PiS MEP Krasnodebski stated: 'Poland faces a greater threat to our sovereignty from the West in the form of the EU than from the East in the form of Russia' (quoted in Notes from Poland, 2022c).

PiS has been against deeper integration in the CFSP area, opposed adopting the QMV in EU foreign policy, viewed the EU as a union of nation-states and preferred bilateral relations, particularly with the US (Interview 20; Polish Ministry of Foreign Affairs, 2023). Its intention to

⁶⁸ An EU diplomat (Interview 7) noted, 'Tusk is not a sellout to his country ... migration for example, they will definitely not agree to the political line of other countries, including Germany', adding, 'They are not stupid, they do not commit a suicide in the national politics' (see also Buras, 2024).

protect Poland's national interests has also been directed against Germany's dominant role within the Union (Interview 4). FM Rau's statement that 'EU needs not German leadership, but German self-restraint' (quoted in Notes from Poland, 2022c) stood in stark contrast with former FM Sikorski's expression that 'I fear Germany's power less than her inactivity' (Sikorski, 2011).⁶⁹ PiS did not view the Weimar Triangle and cooperation with Germany as effective tools for Poland's foreign policy,⁷⁰ and bilateral relations remained tense over, inter alia, differences in the EU's migration policy and Poland's demand for war reparations.⁷¹ The government's advocacy for the creation of regional groupings of the CEE countries, such as the Bucharest Nine (B9) and the Three Seas Initiative (TSI), aimed to increase Poland's regional power and counterbalance Germany within the EU (Interviews 4, 10; see also Balcer et al., 2016, p.3; Cadier, 2021, p.715; Varga and Buzogany, 2021, p.1455; Zwolski, 2017, p.172). However, these endeavours did not fully meet Poland's expectations, as one former senior Polish diplomat (Interview 1) highlighted:

We pushed this stupid, specific, foggy and gloomy Three Seas initiative, absolutely politically and economically ineffective and without special content. We lost almost eight years trying to formulate something new with Hungary, Slovakia, Bulgaria, but on really different small issues. It was the way to marginalise the Polish position in the EU, maybe not isolate but marginalise ... It was a failure of our leadership to have such close 'allied' relations with Hungary.

Admittedly, Russia's full-scale invasion of Ukraine gave more prominence to Poland's position in the EU. However, PiS's disagreements with the EU, its objective to provide a counterweight

⁶⁹ PiS leader Kaczynski went so far as to state that some countries 'are not enthusiastic at the prospect of a German Fourth Reich being built on the basis of the EU' (quoted in DW, 2021).

⁷⁰ FM Waszczykowski specified the UK as Poland's main EU partner in 2016 and deviated from the country's traditional foreign policy strategy (Buras, 2017, p.4; Zuba, 2021, p.405). Germany moved back to the top of Poland's EU partners in the FM's 2017 speech after Brexit (Cadier, 2021, pp.714-715).

⁷¹ The government justified seeking reparations from Germany and not from Russia by noting that Poland perceived the two countries to be from different civilisations, with the Secretary of State Przydacz noting, 'With Berlin, we believe we can start a dialogue but with Putin this is the other civilisation' (quoted in Minder and Pitel, 2023; also Interview 26).

to Germany within the EU and policy-making style limited the country's influence at the EU level (Buras, 2023; Grobe, 2023; Interviews 1, 7, 20, 27).

In sum, both PO's and PiS's strategic policy objectives towards Russia have not been considerably different from the EU's common Russia policy (Interviews 17, 20, 24). Although the two parties have held divergent views on the EU, this has led to their different policy-making styles without affecting Poland's policy objectives regarding EU-level Russia initiatives.

6.1.2. Following the EU line despite restrained ambitions (2014–February 2022)

Poland was at the forefront of the EU's response to the Ukraine crisis in 2014 and generally backed the EU's common position towards Russia between 2014 and February 2022. At the same time, despite its overall support, the country considered the EU's Russia-related initiatives ineffective and demanded tougher EU diplomacy and sanctions. The position was shared by both governments in power and was most evident in their criticism of the Normandy Format and the EU's energy policy (Interviews 1, 4, 10, 17; see also Lynch and Vela, 2022a; Sus, 2018, p.89). Despite some differences, the EU's common policy towards Russia was largely compatible with the Polish governments' strategic policy objectives and did not necessitate significant changes in their policy positions. Therefore, both the PO and PiS governments adopted cooperative strategies and refrained from formal opposition to relatively less desirable EU-level initiatives. The main mechanism of Europeanisation was strategic action, which involved pushing for a tougher EU policy towards Russia while avoiding obstruction of EU action when differences arose between the national and EU levels. This meant that Poland

changed some of its policy positions to align with the EU's less ambitious policies without altering its strategic objectives towards Russia. Hence, the EU's influence on Poland's foreign policy in this period generated the adaptation outcome of Europeanisation.

Early crisis diplomacy and the Normandy Format

Russia's aggressive foreign policy and illegal annexation of Crimea ended normalisation between Poland and Russia (Interview 27), with FMs Sikorski and then Schetyna calling Russia the biggest threat to Poland and international security (Zieba, 2020, p.184). Bilateral diplomacy was almost halted, as the Kaliningrad Triangle and the OSCE Ministerial Council meetings in 2014 were the last high-level contacts between the FMs for the foreseeable future (Dyner, 2020, p.200). The PO government's response to the crisis and Russia reflected its preference for multilateral diplomacy (Baranowski and Cichocki, 2015, p.35; Lada and Wenerski, 2015, p.127; Zajackowski, 2017, p.212) and demonstrated Poland's broadly consistent foreign policy with the EU's common line. FM Sikorski participated in the Weimar Triangle's informal mission to Kyiv to mediate an agreement between the Maidan protesters and President Yanukovich. Poland was firmly convinced that Russia must be stopped by taking a strong position, and this goal had to be achieved through the EU and NATO (Interview 3). A former senior Polish diplomat (Interview 1) described foreign policy under the PO government as 'close to the EU mainstream' and 'more or less politically correct' until 2015. The PO government's multilateralist and EU-oriented approach initially showed strong potential for cross-loading through strategic action or strategic learning from France and Germany. However, Poland's role in mediating the conflict gradually diminished. Namely, Germany and

France took the initiative in the Normandy Format and led negotiations between Ukraine and Russia.⁷² Poland's waning influence was not the consequence of the PO government's deliberate policy choices. Rather, in addition to Germany's mediation strategy and Russia's acceptance of the Format as the only framework for negotiations (Buras, 2014), Ukraine's strategic choices and focus on Germany as its key EU partner contributed to Poland's exclusion from the Normandy Format (Interviews 10, 17, 21, 25). A former senior Polish diplomat (Interview 1) summarised:

We didn't get a final answer from our partners why we were excluded from this [Normandy Format] ... It was eight years of foggy and gloomy Franco-German strategy ... If you protested against the ineffectiveness of the Normandy Format in both NATO and the EU, they clarified to us as a mean student or a schoolboy that 'We discussed with Russia for hundreds of years starting from Napoleon, and it's not your case to teach us what to do with Russia'.

Germany valued Poland's broader cooperation on Ostpolitik, regularly consulted with the country and kept it informed about the process (Buras, 2014; Lada and Wenerski, 2015, p.124; Zajackowski, 2017, p.212). However, Poland's hawkish position on Russia was not fully reflected in the content of the negotiations. One former senior EU diplomat (Interview 18) noted:

I was told by participants from the Ukrainian side to the talks that they were often confronted with the 3+1 situation, and representatives of France and Germany often tried to convince Ukraine to be more forthcoming to Russian demands and find a way of accommodating them.

One could potentially infer that the increasing convergence between Poland's national policy and the EU's common line produced no Europeanisation in the country's foreign policy. However, the empirical evidence shows observable differences between Poland's national

⁷² Although the Franco-German diplomatic efforts were not an official EU mission, they had the tacit consent of member states (see Chapter 4; also Alcaro and Siddi, 2021, p.155; Lovato, 2024, pp.980-983).

position and the EU's policy preferences. Despite the general agreement with the EU's position on Russia, the PO government could not shape the EU's common foreign policy fully according to its strategic objectives, which is a prerequisite for the no Europeanisation outcome (see Chapter 2). Polish diplomacy voiced discontent over its sidelining during the negotiations, with FM Schetyna stating, 'The Ukraine crisis must be solved in the Weimar Format' (quoted in Unian, 2014; Kyiv Post, 2014; also Interviews 1, 17, 25, 29). However, the PO government did not formally oppose the Franco-German position despite considering their leadership and the Normandy Format ineffective (Interviews 1, 3, 24). Statements by PM Kopacz and FM Schetyna (Baranowski and Cichocki, 2015, p.36) confirmed that Poland would not push for policies that could undermine western unity and isolate the country within the EU. They demonstrated the government's cooperative strategy and intention to make changes to its policy position in order to maintain the harmony between the national and the EU levels.

Poland's position can be attributed to several factors integral to its cooperative strategy: The PO government was committed to the EU's role in foreign policy, and the broader EU-level policies and the Normandy Format did not significantly challenge its strategic policy objectives; there was no considerable support for contesting the Normandy Format; and the country struggled to offer a better negotiation format (Interviews 1, 17, 17, 25; Alcaro and Siddi, 2021, p.159). One of the main factors that weakened Poland's arguments was the relative success of the Normandy Format in delivering immediate results by de-escalating the conflict. 'Poland was not in a position to question and argue that more people should die', remarked a Polish policy expert (Interview 25), adding that the country 'did not have a better proposal at that moment'. Therefore, the EU's role prompted the PO government to employ strategic action

and adjust its national position to a less desirable EU-level initiative without altering its strategic objectives towards Russia. Poland's lack of direct participation and already established policy position constrained policy transfers from France and Germany. As Poland did not transform its national policy, challenge the EU's common line or pursue contradictory unilateral objectives that conflicted with the EU, the transformation, resistance and fragmentation outcomes of Europeanisation (see Chapter 2) can be confidently eliminated. Consequently, changes in Polish foreign policy were modest and reflected the adaptation outcome. Europeanisation happened mainly through downloading, as Poland was not directly involved in the Franco-German efforts and accepted the Normandy Format as part of the EU diplomacy (even though it was not an official mission) (Interview 1; Youngs, 2017, p.140), which limited cross-loading.

The similar Europeanisation trend in Poland's foreign policy was visible during the negotiations of the EU sanctions against Russia. Poland was among the most hawkish member states and vehemently supported the most restrictive measures (Interviews 1, 3, 5, 7, 24, 29). Polish diplomacy advocated shifting the EU's sanctions policy from targeting individuals to hitting Russia's economy, which was different from France's and Germany's initially moderate positions (Gotev and Kokoszczynski, 2014). A senior EU diplomat (Interview 2) summarised: 'Poland is never happy with whatever we do with Russia; they always want to do more. Everything we do is not enough, and we should have done more and faster'. FM Sikorski stated that tougher sanctions were preferable to the war between Russia and Ukraine, even though they could also damage Poland's economic interests and noted that it was a mistake for Germany to delay their adoption (Puhl, 2014; Thornhill and Cienski, 2014). A similar sentiment

was shared by the Baltic States and some eastern member state diplomats in the Council working groups such as RELEX and produced frustration among them, as they considered the EU sanctions insufficient (Interview 3). Thus, the empirical evidence helps us demonstrate the differences between Poland's strategic objectives and the EU's common line, even though Poland refrained from a confrontational approach and remained aligned with the broader EU position.

The perception of Russia among the other EU members changed only after the downing of the Malaysian Airlines flight MH17 by Russian separatists. However, the EU sanctions against Russia were still more lenient than Poland would have preferred. While the government cooperated with the like-minded countries, such as the Baltic States, Sweden, Finland and the UK, to push for tougher measures (Interviews 1, 3, 20; see also Czulno, 2022, p.145; Sjursen and Rosen, 2017, p.24), it was difficult to overcome the Franco-German dominance (Interview 24; see also Gotev and Kokoszczyński, 2014). Thus, Poland acknowledged that attaining its maximalist goals would be difficult but remained committed to the EU's common line. Consequently, the PO government moderated its hawkish position (Czulno, 2022, p.145; Gotev and Kokoszczyński, 2014) and did not formally oppose sanctions by using Poland's veto power to demand a more comprehensive EU position. The primary reason was that sanctions were at the centre of the government's foreign policy towards Russia and did not challenge its overarching objectives (Interview 3). Therefore, there were no EU-level pressures on Poland, and the government employed strategic action and voluntarily adapted to a suboptimal and less preferred EU policy when it was unable to alter the status quo, while simultaneously striving to promote tougher EU action against Russia (Interviews 3, 4, 20, 24). Poland's

consultations with the like-minded member states favouring stricter sanctions (Interviews 1, 3, 20) hardly led to strategic learning through policy transfers due to their similar positions, while the Franco-German dominance (Interviews 15, 24) limited policy transfers from these two countries. As a result, Poland changed its national policies to adapt to the EU's common line primarily through downloading.

Same policy through different means

After the October 2015 general election, the main goals of Poland's Russia policy remained largely intact, as the PiS government favoured an even tougher stance against the country. FM Waszczykowski defined Russia's actions as an existential threat to Europe and more dangerous than ISIS (The Guardian, 2017). Poland's Foreign Policy Strategy described Russia as a revisionist power having a detrimental impact on Eastern Europe's stability, while its National Security Strategy underlined Russia's neo-imperial policies, backed up by military means, as the biggest threat to Poland (National Security Strategy of the Republic of Poland, 2020, p.6; Polish Ministry of Foreign Affairs, 2017, p.2, 9). Additionally, Russia's refusal to explain the causes of former President Kaczynski's plane crash and return the wreckage to Poland was another difficult topic in bilateral relations.⁷³

The PiS government adopted a critical stance towards PO's and the EU's handling of the crisis and employed different instruments to attain Poland's strategic policy objectives. Describing

⁷³ PiS saw Russia's cooperation on the issue as a precondition for any improvement in relations with the country (Legucka, 2020, p.124).

PO's policy as inward-looking, a former PiS policy advisor (Interview 4) noted that the former government followed German instructions, and the Polish response to the crisis was soft and defeatist. A former senior Polish diplomat (Interview 10) portrayed PO's foreign policy as bandwagoning the Weimar Triangle, adding that it was difficult to accept and needed to be replaced by a strategy of building alternative coalitions within the EU. FM Waszczykowski went further and stated that the Weimar Triangle lost its viability (Feilcke, 2016).⁷⁴ One of the main reasons for the government's sceptical approach to the Weimar cooperation was its perception of Germany and France as pro-Russian forces within the EU (Interview 4).

The PiS government criticised the Minsk agreements and saw the Normandy Format as a concert of great powers making decisions for the CEE states without their participation (Interview 3; Sus, 2018, pp.81-82; Zwolski, 2017, p.174), which showed that there is no complete convergence between Poland's national policy and the EU's common line. This helps us eliminate no Europeanisation, as Poland's strategic objectives must have been fully reflected in the EU's common position if this outcome had occurred. The PiS government was unable to exert significant influence on the Normandy Format and the Minsk talks, which showed persisting differences between Poland's policy preferences and the Franco-German-led EU position. President Duda's endeavours to change the negotiation format through the involvement of Poland, Ukraine's neighbours and the US proved futile and were rejected by Germany, Russia and Ukraine (Burlyuk, 2017, pp.317-318; Lada and Wenerski, 2015, p.124; Zajac, 2016, p.148; Zajackowski, 2017, pp.199-200). Further, FM Waszczykowski's offers to

⁷⁴ PiS did not prioritise the Weimar Triangle even though its foreign policy strategy underlined deepening collaboration within the format as one of the objectives of Poland's neighbourhood policy (Polish Ministry of Foreign Affairs, 2017, 11).

extend the Normandy Format or utilise a wider format in the form of the Geneva Format by including the Americans also failed to garner enough support (Unian, 2016; Ukrinform, 2017).

PiS abandoned PO's policy of close partnership with Germany and France, as it intended to develop close bilateral relations with the US and build regional coalitions of the CEE countries. In this regard, the B9, the TSI and the V4 emerged as alternative regional groupings and were supported by the US (Interviews 10, 29). By excluding Germany from the TSI, Poland attempted to improve its ties with the CEE states and demonstrate Germany's isolation in the EU (Buras, 2017, p.5). However, PiS's preference for alternative formats negatively affected Poland's position in the EU's foreign policy-making and its Russia policy (see Davies, 2020). One former policy advisor (Interview 15) noted: 'Poland was not listened to, Poland's credibility was not there, and whatever the Poles said did not matter. Tusk's position in the EU Council was more important than that of any politician in the Polish government' (see also Interview 20; Zajackowski, 2017, p.196). Relatedly, a former senior Polish diplomat (Interview 1) recalled:

We changed our set of friends after 2016, and our position started to be closer to the Hungarian and not so friendly like before to the German or French ... Because of our specific position and close relations with Hungary in many EU affairs, we started to be less worthy for other EU partners and less active in creating the EU foreign and security policy. It was also the case in NATO.

Internal differences among the CEE countries' foreign policies vis-à-vis Russia prevented them from agreeing on a common position and presenting it at the EU level (Forbrig, 2015; Marusiak, 2015; Zwolski, 2017, p.176). The PiS government's reluctance to keep meaningful bilateral contacts with Russia and broader differences with the EU and Germany also contributed to Poland's reduced role within the EU (Sus, 2018, p.89; Zajac, 2016, p.171). From the Europeanisation perspective, although Poland's collaboration efforts within the EU offered

evidence for cross-loading, they left little room for strategic learning due to Poland's similar objectives with like-minded states and a more determined policy position towards Russia than France and Germany, meaning that changes in the country's foreign policy were not considerable.

The PiS government's sustained advocacy for a harsher EU stance in the face of its disagreement with the EU's more pragmatic common Russia policy provides evidence for downloading in explaining changes in Poland's foreign policy. There were several differences between Poland and the EU, and the government made compromises without resorting to conditional dissent or contesting the EU's agreed-upon line. In this context, while in opposition, PiS proposed Russia's exclusion from SWIFT (Lada and Wenerski, 2015, p.123), which could not be materialised. PM Morawiecki described Russia as a 'hostile regime' (Reuters, 2020), and Minister for European Affairs Szymanski pushed for the halt of the Nord Stream 2 pipeline in reaction to the Navalny poisoning (Szymanski, 2020). Despite the PiS government's difficult relations with the EU, the perception of Russia as a threat in Poland necessitated the country's continuous diplomatic engagement with the EU partners (Interview 20). As one former Polish diplomat (Interview 29) remarked, 'It's always better to do less together than more alone, and I think that's a good approach that this was implemented here'. However, Poland's demands for war reparations from Germany, cancellation of the helicopter contract with France and rule-of-law disputes with the EU complicated its cooperation with EU partners in foreign and non-foreign policy areas (Interview 7; Zieba, 2023). More importantly, the government's Russia policy did not resonate at the EU level (Interviews 15, 24). A former Polish diplomat (Interview 3) noted that it was clear to Poland that the EU's policy was still

insufficient, but there was also an ‘understanding among Poland’s foreign policy circles that there is little we can do apart from sanctions’.

Admittedly, Poland’s efforts achieved a joint B9 declaration to criticise Russia (President of Romania, 2021). Further, together with the Baltic States, Poland blocked the Franco-German proposal to reset relations with Russia and hold meetings at the EU leaders’ level at the June 2021 Council summit (Herszenhorn and Barigazzi, 2021; Herszenhorn et al., 2021). Instead, the language of the Council conclusions was tougher, which emphasised a coordinated EU response against Russia’s ‘malign, illegal and disruptive activity’ (European Council, 2021a). A former Polish policy advisor (Interview 4) noted that the Franco-German initiative to organise an EU summit with Putin in June 2021 and their condemnation of the Ukrainian drone strike against a Russian howitzer in October 2021 symbolised the two countries’ pro-Russian leanings (see also Klain, 2021).

Nevertheless, Poland’s diplomatic endeavours were not enough to steer the EU’s Franco-German-dominated common Russia policy until February 2022 (Interviews 1, 4, 15, 24). Thus, while still maintaining its assertive position, the PiS government scaled back its more ambitious objectives and adopted a cooperative strategy despite its disagreements with the EU mainstream and Germany. There was limited strategic learning, as Poland’s ongoing exclusion from the Normandy Format restricted direct policy transfers or learning from France and Germany. The PiS government’s scepticism toward Germany, unwillingness to closely cooperate with the Franco-German leadership and overlapping policy preferences with the like-minded Baltic States (which were directed to achieve a resolute EU position on Russia)

further reduced the potential for cross-loading through strategic learning. Hence, Europeanisation happened through downloading and led to modest changes in Poland's foreign policy during the PiS government, resulting in the adaptation outcome. Other outcomes of Europeanisation can be discarded, as the differences between the national and the EU positions ruled out no Europeanisation, while Poland's broader alignment with the EU line eliminated transformation, fragmentation and resistance. In terms of alternative explanations, it is difficult to associate changes in Poland's foreign policy with the US's and NATO's influence. This is largely because Poland's position had already been mostly compatible with the EU's common Russia policy and did not necessitate any external pressures from the US or NATO to conform with the broader western stance. Although the PiS government's close engagement with the Trump administration on security issues and the US's backing might have contributed to its endeavours to form regional groupings within the EU (Interviews 4, 10, 20, 29), these efforts did not alter Poland's national position and strategic policy objectives and were limited to changes in policy-making procedures and strategies.

Reducing energy dependence amid EU-wide inaction

Following the Ukraine crisis, Poland's energy strategy intended to develop a common EU energy policy, prevent the construction of the Nord Stream 2 pipeline and find alternatives to Russian supplies (Bińczyk-Misala, 2016, pp.105-106). Both the PO and PiS governments maintained their cooperative strategies to reduce Poland's dependence on Russian energy imports, as EU-level initiatives were compatible with their strategic foreign policy objectives. PM Tusk proposed an energy union that included the establishment of an EU body to negotiate

energy contracts between member states and Russia (Tusk, 2014), which was also strongly supported by PiS (Interview 27). The plan aimed to increase solidarity among member states and strengthen the EU's energy security and negotiating position in dealings with Russia (Tusk, 2014). Although the EU's Energy Union Package underlined the necessity of diversifying energy sources, supplies and transit routes (European Commission, 2015), it did not include a formal mechanism for common gas purchases.

Due to the loose nature of EU-level efforts and the economic approach to energy cooperation with Russia among other member states (Interview 11; Siddi, 2019), Poland's national policy remained more ambitious than the EU's position. According to a former senior EU diplomat (Interview 18), the EU's energy security initiatives remained rather on paper between 2014 and February 2022. Poland aligned with EU-level initiatives through downloading, but Europeanisation produced marginal changes in Polish foreign policy, since the country also adopted unilateral measures to ensure its national security. In the absence of the EU's common approach, minimising energy supply dependence was reflected in Poland's National Security Strategy (2014), and diversifying energy supplies was identified as a strategic objective to enhance the country's resilience to Russia's economic pressure (Martewicz, 2018). The construction of the Swinoujscie LNG terminal and the LNG deal with Qatar, signed in 2009, represented important steps in reducing Poland's nearly 90% dependence on Russian energy supplies, while Poland also signed a series of LNG agreements with the US (Reuters, 2017; Zieba, 2020, pp.78-80). Additionally, the long-considered Baltic Pipe project from Norway was

revived, with expectations for it to become operational by 2022.⁷⁵ As a result, Poland's imports from Russia dropped to 55% on natural gas and 65% on oil by 2022 (Forum Energii, 2022).⁷⁶ Thus, where there was no decisive EU action despite the provisions of the Energy Security Strategy and the Energy Union Package, both Polish governments took concrete measures to improve Poland's energy security before Russia's full-scale invasion.

Poland viewed energy security as intrinsically linked to national security, which contrasted with the economic and commercial approach of some member states, such as Germany, to energy relations with Russia (Interview 11). The PO, and particularly the PiS government, consistently urged the EU and Germany to stop the Nord Stream 2 pipeline and argued that the project undermines the EU unity and the Energy Union (Interviews 1, 3, 15, 24, 27). Minister for European Affairs Szymanski wrote that Germany's position on the issue contradicts the EU's common Russia policy and supports Russia's economy (Szymanski, 2020). A former Polish diplomat (Interview 1) remarked:

It was difficult to discuss the Nord Stream with them [Germany]. They presented the stupid commercial vision of the project to us and NATO partners, and it was lovely for me to realise that all, excluding the Germans, around the table were laughing at this idea.

However, Poland's and other CEE states' positions were neutralised by member countries that persisted with economic cooperation with Russia. The Polish diplomat (Interview 1) continued, 'We have, from the beginning, a weaker position to convince Europeans to be strategically and economically independent from Russia', adding, 'especially Germany, Italy and the

⁷⁵ The Baltic Pipe was expected to deliver 2.4 bcm of gas annually (with the capacity of 10 bcm) and cover 15% of Poland's annual gas consumption (Sandford, 2022).

⁷⁶ In comparison with the major importers of Russian gas in the EU, Poland reduced its gas dependence by 14% between 2014 and 2021 (PEI, 2023).

Netherlands minimised our position ... For them, it was not a big issue at all'. Germany's attempts to proceed with the pipeline and exclude the Nord Stream 2 from the EU's unbundling rules were also 'a very bitter reminder of how the EU solidarity works in practice' (Interview 3). Consequently, Poland's active diplomatic efforts were not enough to halt the Nord Stream 2 before February 2022, prompting the country to adjust its national stance by accepting the less desirable EU position. The EU's influence on Poland's foreign policy was limited due to significant overlap between the national and the EU levels in the energy security area. Despite not achieving all their aims, the EU-level efforts (albeit far from ideal) reflected the strategic policy objectives of both Polish governments to reduce dependence on Russian fossil fuels. Therefore, they adopted cooperative strategies and aligned with EU-level initiatives through their strategic action, and Europeanisation led to limited adaptation in Poland's foreign policy in this area.

6.1.3. Limited adaptation after the full-scale invasion of Ukraine (February 2022–June 2024)

Poland's unequivocal stance and consistent warnings about the Russian threat in the lead-up to the invasion of Ukraine gave the country a moral authority and elevated it to the core of the EU's Eastern policy, which had been dominated by the Franco-German partnership (Interview 6; see also Buras, 2023; Francis, 2023; Keiger, 2023). Polish foreign policy aimed to achieve Russia's strategic defeat by supporting Ukraine and employing all available instruments both at the national and EU levels (PAP, 2023; Polish Ministry of Foreign Affairs, 2023). Poland's Russia policy specifically pursued two objectives during the February 2022–June 2024 period:

imposing tougher EU sanctions to cripple Russia's war effort and cutting all energy imports to end the EU's dependence. Although the PiS and PO governments resorted to different policy instruments, there was a consensus between them regarding Poland's strategic policy objectives vis-à-vis Russia. As EU-level Russia initiatives largely reflected their national priorities, both governments easily aligned with the EU's common line by adopting a cooperative strategy without making considerable changes to their policy positions. Hence, the EU's role in Poland's foreign policy towards Russia produced limited adaptation due to minor differences between the national and EU levels.

Advocating for sanctions and reducing energy dependence

Poland had no illusions about the Russian threat, and it enabled the country to rally western solidarity against the invasion at a time when the Franco-German partnership was paralysed due to diplomatic failures and uncertainty over how to respond during the early phase of the war (Interviews 4, 15, 24, 26, 27). Poland's years-long scepticism of Russia was belatedly acknowledged by the Commission President von der Leyen, who stated that the EU should have learned from member states that had warned about Russia's intentions (European Commission, 2022a). The EU's more resolute response to Russia brought its common policy closer to Polish governments' strategic policy objectives, meaning that changes in the country's foreign policy were likely to be minimal as a result of Europeanisation.

Nevertheless, Poland's foreign policy did not fully align with the EU's common line, nor with the policies of member states that favoured a relatively softer stance against Russia, which

help exclude the no Europeanisation outcome. The potential fall of Ukraine was perceived significantly differently through the lens of Poland's threat perception and viewed as necessitating a strong response to Russia (Interviews 3, 5, 7). In this sense, the country's position was intended to prevent indecisiveness in the western stance that could lead to the appeasement of Russia (Interviews 4, 10, 15). Noting that 'the price of European naivete over Russia is Ukrainian blood', PM Morawiecki underlined that there should be no return to business as usual until Ukraine's territorial integrity is restored (Morawiecki, 2022a). Poland's far-reaching proposals against Russia sometimes alarmed other EU partners, as a former senior Polish diplomat (Interview 10) was confounded at some EU member states' reaction to their deputy's suggestion that Russia should be humiliated in a military domain:

This particular word, humiliated Russia, was terrifying for our French, German, Italian and Spanish friends, because they were frightened that humiliated Russia would be more aggressive against western Europe. So, they were terrified by the war.

When there were discussions between the peace and justice camps in Europe following the first few months of the war (Krastev and Leonard, 2022; Tocci, 2023), Poland was determinedly in the latter group. A former PiS policy advisor (Interview 4) stated: 'We think justice before peace; you cannot make a real peace without defeating aggression'. The position was constantly articulated by Polish officials who wanted to prevent any complacency in the western response to Russia (Interviews 4, 10, 26). When news emerged in May 2022 about Chancellor Scholz and President Macron's three-way phone call with Putin, President Duda was highly critical, comparing it with 'speaking with Hitler' (quoted in Notes from Poland, 2022b).

The empirical evidence shows the cross-loading and downloading dimensions of Europeanisation, even though Polish foreign policy did not undergo significant changes. Cross-loading was evident in the country's cooperation with like-minded states within the EU in order to push for tougher EU reaction to Russia. Being proven right about Russia's intentions and the inactivity of France and Germany created a window of opportunity for Poland and the Baltic States to play a more active role in formulating the EU's sanctions policy during the early phase of the war (Interviews 2, 5, 10).⁷⁷ PM Morawiecki confirmed Poland's assertive position by noting, 'Poland was among those countries that proposed the most far-reaching sanctions – further, very extensive sanctions that will cut off the flow of fresh resources, the flow of money to the Russian state budget' (Chancellery of the Prime Minister Republic of Poland, 2022). Despite this, Poland was often dissatisfied with the EU action against Russia (Interviews 2, 4, 26). On 14 March, at the summit of the Lublin Triangle, Poland, Lithuania and Ukraine called for freezing Russian state assets and using them for Ukraine's reconstruction (Notes from Poland, 2022a). On 25 March, PM Morawiecki, together with Slovenia and Czechia, presented a ten-point plan to save Ukraine, which considered the EU's first four sanctions packages insufficient and called for additional measures against Russia (Morawiecki, 2022c). Poland's demands included sanctions on the EU's import of Russian oil and gas, the removal of all Russian banks from SWIFT and the inclusion of the Russian nuclear sector in sanctions (Cook, 2022; Moens, Barigazzi and Lynch, 2022). PMs Morawiecki and then Tusk proposed imposing a full trade blockade on Russia and using all frozen Russian central bank assets for the reconstruction of Ukraine (Lynch, 2022b; Notes from Poland, 2024c; Rankin, 2023). Further,

⁷⁷ The first phase of sanctions allowed the hawkish states to 'send their 'their wildest sanctions dreams' to the Commission, who would then, more often than not, include them directly into the proposed sanctions package' (anonymous diplomat quoted in Olsen, 2022, pp.32-33; see also Chapter 4).

Poland led the group of countries demanding an EU ban on imports of Russian diamonds and agricultural products, sanctions on IT and tech sectors and a lower price cap on Russian oil exports (Fella, 2024, pp.45-46; Fleming, Foy and Bounds, 2022). The change in government did not alter Poland's sanctions policy, as PM Tusk also advocated 'the broadest possible sanctions', including import bans on Russian nuclear fuel, LNG, aluminium and agricultural products (Notes from Poland, 2024b).

Although Poland individually sanctioned Gazprom and numerous Russian oligarchs and companies (NPR, 2022), it was unable to achieve all of its goals regarding the EU's Russia sanctions. Namely, contrary to Polish proposals, the EU refrained from targeting all imports of Russian oil and gas, did not remove all Russian banks from SWIFT, did not impose a total trade embargo on Russia and avoided the complete immobilisation of Russian central bank assets due to a lack of consensus among the G7 countries and reservations from France and Germany (Brzozowski, 2024b; Wisniewska, 2024). Moreover, the price cap on Russian oil exports was set at \$60, well above the \$30 cap proposed by Poland, leading to PM Morawiecki's criticism of other member states for acting in a 'very selfish way' (Koutsokosta and Liboreiro, 2022). Thus, Poland's inability to fulfil all of its strategic policy objectives demonstrated that, despite broadly aligning with the EU, the country could not formulate the Union's common position entirely in line with its own preferences, which eliminates the transformation and no Europeanisation outcomes (see Chapter 2). Both Polish governments' cooperative strategies led to their eventual alignment with the EU, meaning that Poland changed its foreign policy through downloading despite disagreements with the EU line.

Poland's tough stance on sanctions also delayed some EU-level decisions. For instance, together with Lithuania, Poland blocked the adoption of the ninth package due to exemptions for Russian grain and fertiliser exports (Prysmantas, 2022).⁷⁸ The two countries' differences with the western member states were overcome after refining the language of the deal and allowing individual members to unfreeze the money of Russian businesspeople involved in food and fertiliser exports (Rettman, 2022; Savage et al., 2022). Similarly, Poland's hard-line position and demand for a low import quota for Russian synthetic rubber isolated the country and put it against other member states, particularly Italy, leading to its reluctant agreement with the EU's common position (Baczynska, 2023; Kijewski and Barigazzi, 2023). However, the PiS government's strategy did not translate into conditional dissent. Nor did it produce a broader pattern of opposition to the EU and contentious national position that diverged from the EU line, meaning that Europeanisation was not in the form of fragmentation or resistance. A former Polish policy-maker (Interview 20) highlighted, 'We took the position that someone had to be more radical and, on the wing, because someone had to do it', noting, 'With the Baltics, we were supported by Sweden and Finland. Then, as a result, you have a compromise but closer [to Poland's position]'. A former senior Polish diplomat (Interview 10) added:

Polish position and arguments usually were much tougher and more severe, but our expectations were rather under a process of moderation from our western partners, and it was very visible during discussions about sanctions packages. So, I guess we can generally say that the final effect was a kind of compromise.

Following February 2022, both Polish governments in power shared a consensus to eliminate Russian energy imports and invest in gas infrastructure, despite their differing approaches to

⁷⁸ After forming the government, PO also backed an EU-wide import ban on Russian and Belarussian agricultural imports and adopted the Sejm resolution to strengthen Poland's negotiating position in the EU (Notes from Poland, 2024d).

the EU's energy initiatives, such as the Green Deal (Interviews 1, 15, 21, 27, 29). A shift in the EU's approach to importing Russian fossil fuels and the adoption of the REPowerEU initiative resulted in Poland's strategic policy objectives (albeit to a lesser extent due to its own efforts than Russia's invasion) aligning more closely with the EU's mainstream. Poland's willingness to proceed with weaning itself off Russian energy imports despite significant economic costs enabled the country to press for a common energy policy. The PiS government had already decided against extending the expiring gas contract with Gazprom in 2019 (see Section 6.1.2) and pledged to end all Russian energy imports by 2022. PM Morawiecki urged other EU partners to take similar measures and underscored a shift in Russia's use of energy from a tool of blackmail to 'a tool of war' (quoted in Wanat, 2022). Despite the challenges in replacing the imports of Russian LPG (Notes from Poland, 2023b) and Russia's decision to cut gas supplies in response to Poland's refusal to pay in rubles in April 2022, Poland's determination remained unwavering. The completion of the Baltic Pipe from Norway in September 2022 and the increase in LNG imports from the US and Qatar helped Poland meet its gas demand (Sandford, 2022), while the country turned to imports from Saudi Arabia, the UK, Norway, the US and western Africa to substitute Russian oil imports (Hillebrand, 2022; Reuters, 2024b).

The empirical evidence shows that, in the face of challenges to achieving their maximalist objectives, the PiS and PO governments did not resist the EU's common diplomatic reaction to Russian aggression and sanctions policy. Their occasional disagreements with the EU did not lead to hard bargaining, as EU-level initiatives remained largely aligned with their strategic foreign policy objectives. There were no EU-level pressures on Poland, and both cross-loading and downloading dimensions contributed to Europeanisation. Unlike the 2014–February 2022

period, the weakened Franco-German leadership enabled Poland to become one of the leading member states steering the EU's common foreign policy (Interviews 2, 4, 5, 7, 26). Thus, Poland engaged in consultations and coordination with fellow member states in the policy-making phase of the EU's response to Russia and sanctions policy, showcasing the cross-loading dynamics in the moderation of the country's policy positions. Simultaneously, however, most of the policy proposals advocated by Poland became part of the EU's common position after undergoing some modifications and moderation due to the positions of other member states, which ensured a consensus at the EU level. This meant that the country also adapted to them through downloading because of the EU factor.

Strategic action functioned as the main mechanism of policy change in Poland's foreign policy. While in the case of reducing dependence on Russian energy, it was a straightforward decision to subscribe to the EU-level policy, both Polish governments' strategic actions also comprised making compromises concerning the sanctions policy to achieve the common EU position (see Interviews 10, 20). Admittedly, the EU's efforts in the energy area hardly changed Poland's national position, as the country had already taken measures to reduce its dependence on Russia, which could indicate the no Europeanisation outcome. However, both Polish governments moderated their initial positions by adapting to the EU's common line and dropping their demands for more far-reaching sanctions, showing that there were changes in Poland's foreign policy. Their extent was minimal and produced the minimal adaptation outcome of Europeanisation due to the country's very active role in formulating the EU's diplomatic response and sanctions policy, as well as the increasing overlap between the national and EU levels.

Polish diplomacy within the EU

Poland's growing role in the EU after Russia's full-scale invasion did not change the PiS government's EU-level strategies. The rule-of-law issue did not disappear, and Poland continued to cooperate with CEE countries to counterbalance Germany within the EU and prioritised relations with the US regarding national security (Interviews 3, 20, 29).⁷⁹ The V4 became inoperative due to significant differences between Hungary's and Poland's policies towards Russia (Interviews 1, 2; see also Beck, 2022; Jack, 2022a; Lopatka, 2022).⁸⁰ The PiS government deepened collaboration with the Baltic and Nordic countries (Interview 10) and used every opportunity to pressure Germany. Namely, Germany's slow response to the war enabled the Polish government to seize the moment and push for a tougher German policy towards Russia (Interviews 4, 10, also 26, 27). This represented a considerable shift compared to the 2014–February 2022 period when Poland's such efforts did not resonate much among other EU partners. Hence, Germany had little direct influence on Poland's Russia policy and had to adopt a more assertive Russia policy itself as the situation on the battlefield deteriorated for Ukraine (Interview 4).

However, the PiS government's confrontational leadership limited the country's position within the EU and among other member states, despite Poland's active diplomatic endeavours

⁷⁹ However, despite PiS's pro-American stance, deeper cooperation was hindered by ideological differences and the US's support for Germany (Interview 4).

⁸⁰ Despite serious disagreements and criticism of Hungary, PiS refrained from open confrontation with the Fidesz government (Arjakas, 2023, pp.5-7).

(Buras, 2023). 'Poland has not really been concerned enough about the unity of the alliance', observed the now Undersecretary of State Baranowski, adding that the leadership 'can be done with a little bit better style' (quoted in Grobe, 2023). Differences between Poland and Germany persisted regarding sanctions, support for Ukraine and the pace of the EU's response to the war. Relations remained strained and trust between the countries reached the lowest level since 1989 (Baranowski quoted in Minder and Pitel, 2023), with PM Morawiecki stating, 'Anyone who reads the notes of EU meetings knows that Germany is the biggest impediment when it comes to more decisive sanctions' (quoted in Connolly and Wintour, 2022). One former PiS policy advisor (Interview 4) noted that Germany was losing political and moral position among the CEE countries 'as a pro-Russian power' due to its inactivity in the early phase of the conflict, while a former senior Polish diplomat (Interview 10) stated that Germany's *Zeitenwende* was 'a set of beautiful words but no actions'. Although the PiS government did not alter its harsh stance against Russia, its approach to relations with Germany limited Poland's influence in steering the EU's common foreign policy (see Interviews 1, 7, 20, 27). Consequently, the government's heavy criticism of Germany, the diminished Franco-German leadership in the EU's Eastern policy and Poland's unwillingness to accept their potentially softer positions constrained strategic learning from these countries. For its part, the country's active coordination with the CEE, Baltic and Nordic countries within the EU to push for a stricter response to Russia and sanctions policy (Interviews 1, 4, 10, 15, 29; Fella, 2024, pp.45-46; Fleming, Foy and Bounds, 2022) did not produce considerable strategic learning because of Poland's increasingly similar position with these member states. Thus, even though the PiS government engaged in cross-loading with like-minded countries, its

efforts were driven by strategic action and resulted in minimal changes in Poland's foreign policy.

After taking office following the 2023 election, PO aimed to re-establish Poland's central role in the EU and end its conflict with EU institutions. The new government favoured less confrontational relations with the EU and avoided prioritising cooperation with the US over the EU (Interviews 1, 7, 15, 20, 27). FM Sikorski criticised the former government for employing negative EU-level tactics, such as 'blocking, vetoing and breaching or ignoring the EU law', noting that Poland does not have to choose between the US and European allies (Polish Ministry of Foreign Affairs, 2024, pp.2-6). A former Polish policy advisor (Interview 15) remarked that Poland is now in the co-deciding seat in the most important EU topics, adding, 'Poland was underperforming in this period [between 2015 and 2023], and after the 2023 election, it is now overperforming'. PM Tusk's strategy was intended to put Poland at the core of EU policy-making by reviving the Weimar Triangle and helping improve the Franco-German relationship (Interviews 1, 7, 15, 25, 27; see also Foy, 2024b; Krzysztozek, 2024b). While some differences among the countries remained (The Economist, 2024), the format helped them present a united EU front for counterbalancing Russia (see Allik, 2024).

The PO government aimed to use regional groupings and intra-EU alliances, such as cooperation with the Baltic and Nordic countries, to influence the EU from within rather than seeing them as an instrument to oppose the German dominance (Interview 27). The new government also changed PiS's relatively tolerant position towards Hungary and took a more critical position, as PM Tusk stated: 'Those who silently support Putin are betraying Europe in

every way' (quoted in Krzysztozek, 2024a). However, the changes in the conduct of Poland's foreign policy resulted from domestic developments, reflecting a shift in policy-making procedures rather than a revamp of the country's strategic objectives due to the EU's influence. Although the PO government's EU-oriented approach enabled more cross-loading opportunities with the EU mainstream and Poland's traditional partners, such as the Baltic and Nordic states, room for strategic learning remained limited because of Poland's largely unaltered and firm stance on the EU's common foreign policy towards Russia. Therefore, despite their varying views of the EU, strategic action remained the main mechanism of Europeanisation in cross-loading and downloading dimensions under both Polish governments. PO's and PiS's coordination with fellow member states (cross-loading) was driven by their similar strategic objectives regarding EU-level initiatives and attempts to influence the EU's common line, which, in most instances, resulted in adaptation of Poland's foreign policy to relatively suboptimal proposals in the process.

6.2. Polish foreign policy towards Ukraine

6.2.1. Poland's strategic policy objectives towards Ukraine

Ukraine has been the main strategic objective in Poland's Eastern policy after the country's formal independence. Successive governments, guided by the Giedroyc doctrine, have attempted to bring Ukraine closer to Euro-Atlantic structures and help it become a democracy. The strategy has been closely connected to Poland's threat perception of Russia and has been

driven by the notion that Ukraine dominated by Russia would be a strategic weakness for Poland's national security (Interviews 15, 24; Buras, 2017, p.9; see also Zwolski, 2018, p.180; Zajac, 2016, p.137). Put differently, Poland's strategic culture has internalised the belief that a Russian-controlled Ukraine would undermine its geopolitical position (Krasnodebska, 2020, p.190).

The 2014 crisis solidified the conviction among the Polish policy-making circles that support for free and independent Ukraine must be intensified (Interviews 3, 20, 21, 24). A few days after Russia's annexation of Crimea, PM Tusk described Ukraine as an 'existential question' for Poland (quoted in Zajackowski, 2017, p.187). Almost ten years later, the same position was resonated by FM Rau, who stated that Ukraine's EU and NATO membership is in 'Poland's most vital, existential interest' (Polish Ministry of Foreign Affairs, 2023, p.33). Further, strengthening Ukraine's independence, sovereignty and territorial integrity and supporting its Euro-Atlantic ambitions were included in Poland's National Security Strategy (2020, p.25). Thus, the first dimension of Poland's strategic objectives towards Ukraine has been driven by its geopolitical and geostrategic interests.

At the same time, Ukraine facilitated a nation-building process after 2014, which has been accompanied by the glorification of controversial organisations such as the Organisation of Ukrainian Nationalists (OUN) and the Ukrainian Insurgent Army (UPA). This has become a source of friction in Poland–Ukraine relations, as these groups were involved in the massacre of Polish people in Volhynia during the Second World War (Szeligowski, 2020a, p.217; Zajackowski, 2017, p.187). Both the PO and PiS governments have attempted to address

disagreements over history and demanded that Ukraine allow the exhumation of the victims of the Volhynia massacre (Kononczuk, 2018; Minder, 2024). Therefore, addressing historical differences with its eastern neighbour has been the second dimension of Poland's strategic objectives towards Ukraine.

The PO and PiS governments' Ukraine policies have largely been in line with the EU's common position since 2014. The differences between the parties have been more about rhetoric and tactics for realising Poland's national policy goals than about strategic policy objectives of the country's Ukraine policy (Interviews 10, 17, 21, 24, 26).⁸¹ The PO government's EU-oriented foreign policy strategy has favoured multilateral EU policies towards Ukraine over unilateral national action, which also aligned with Germany's Ukraine strategy (Buras, 2015a). It insisted on the adaptation of the EaP to the changing circumstances after 2014 (Buras, 2015b) and declared support for Ukraine's EU membership as the priority of Poland's European policy after coming back to power in 2023 (Polish Ministry of Foreign Affairs, 2024, p.10). 'We were among the first five to six countries leading the EU and the first among the others', noted a former senior Polish diplomat (Interview 1), adding that Poland was very positive about the idea of potentially complementing the Weimar Triangle with the addition of Ukraine during the PO government.

Regarding historical issues, challenges in bilateral relations after PO's return to the government in December 2023 confirmed that the differences between the two countries largely transcend

⁸¹ PO's and PiS's views on the EU's role in Poland's foreign policy was discussed in the previous chapter. This section focuses on Ukraine-related aspects of the two parties' EU policies.

the main political parties in Poland (Kuisz, 2024).⁸² In his exposé to the Sejm, FM Sikorski stated, 'The sense of sharing common goals with Ukraine will be neither full nor permanent if we fail to understand our common history', noting Poland's expectation of cooperation from Ukraine on the exhumation of Volhynia victims (Polish Ministry of Foreign Affairs, 2024, p.11). Ukraine's demand that Poland refrain from referencing the Volhynia massacre sparked diplomatic tensions and elicited strong responses from the PO government (Khalilova, 2024; Mularczyk, 2024). In this context, Poland's Defence Minister Kosiniak-Kamysz stated, 'There will be no consent for Ukraine to join the European Union if it does not resolve the Volhynia issue' (quoted in Krzysztozek, 2024c).

Poland's strategic policy objectives towards Ukraine were not much different under the PiS government, as the party maintained its support for the country's EU and NATO membership (Balcer et al., 2016, p.1; Cadier and Szulecki, 2020, p.1004; Polish Ministry of Foreign Affairs, 2023, p.33). However, the government's Euroscepticism, efforts to build alternative coalitions within the EU, prioritisation of relations with the US and attempts at non-cooperative leadership undermined Poland's influence within the EU (Buras, 2023a; Interviews 4, 20; Zwolski, 2017, pp.176-177). Poland's exclusion from the Normandy Format strengthened the unfavourable view of the Franco-German mediation efforts while also limiting the government's opportunities within the EU. A former senior Polish diplomat (Interview 26) assessed the two countries' role negatively and noted: 'Poland was marginalised in terms of policy towards Russia and Ukraine. In connection, it did not present any policy initiatives'.

⁸² While the PO government's unexpectedly harsh rhetoric was 'to an extent manipulative' and connected to domestic political competition with PiS and right-wing parties, the view on historical issues is more or less the same among the Polish political elite (Interview 27).

Relatedly, a former PiS policy advisor (Interview 4) stated, 'I think that Polish–Ukrainian cooperation is simply against German interests', explaining it with the view that a strong block of anti-Russia countries in the EU would reduce France's and Germany's influence.

PiS pursued a more assertive historical policy towards Poland's neighbours after its victory in the presidential and parliamentary elections in 2015 (Cadier and Szulecki, 2020). Combined with the nation-building process in Ukraine, this led to souring relations between Poland and Ukraine and resurfaced different interpretations of history (Interviews 15, 21, 27). Memory politics (Notes from Poland, 2023a) and bilateral disagreements, for which PiS partly blamed Germany and the EU (Interviews 4, 10), did not disappear after Russia's full-scale invasion. However, in the light of Poland's strategic policy objectives, these issues did not stop the government's conviction that Ukraine must be supported at all costs (Interviews, 3, 10, 24, 26)

Overall, the necessity of supporting Ukraine and addressing historical issues has been central to Poland's strategic objectives regarding the country. While both Polish governments' primary strategic objective has been to stand with Ukraine against the Russian threat, different interpretations of history, though they have not redefined Poland's national policies, have revealed that historical issues still occupy an essential place in Poland's view of Ukraine regardless of the political party in power.

6.2.2. Adaptation to the constraints of the EU's common line (2014–February 2022)

Following the 2014 crisis, there was a firm conviction among the main Polish political parties that the institutionalised West should increase its support for Ukraine, not least because the realisation of Russia's objectives in Ukraine would be a serious threat to Poland's security (Interviews 3, 15, 21, 24). During the 2014–February 2022 period, Poland's Ukraine policy was driven by three main objectives: providing diplomatic support, advancing Ukraine's integration with Euro-Atlantic institutions and assisting the country in the security area. Simultaneously, Poland was increasingly disillusioned by its exclusion from the conflict resolution process, which largely reflected the French and German interests. The country considered the steps taken by the EU, particularly in combination with its common Russia policy, to be light-hearted and insufficient (Interviews 17, 21, 24). However, both the PO and PiS governments adhered to the EU's common Ukraine policy, which, despite some disagreements, aligned with their strategic policy objectives. They employed cooperative strategies vis-à-vis EU-level Ukraine initiatives and moderated their positions in some areas to align with the EU's common position. Therefore, the EU's influence led to non-fundamental changes in Poland's foreign policy towards Ukraine between 2014 and February 2022 and resulted in the adaptation outcome of Europeanisation.

PO's multilateralist diplomacy and support for Ukraine

Poland was very attentive to the developments in Ukraine from the early days of the Maidan Revolution as one of the owners of the EaP initiative. The PO government's emphasis on

multilateral diplomacy ensured that the country coordinated its crisis response with its western allies (Baranowski and Cichocki, 2015, p.35; Zajackowski, 2017, p.212). FM Sikorski attempted to keep Poland at the centre of EU decision-making by coordinating with the Weimar partners and being an outspoken advocate of Ukraine's cause in the EU (Interviews 3, 20). However, the launch of the Normandy Format and Poland's exclusion from the talks reduced the country's initial influence on Ukraine-related issues (Interviews 1, 24, 26). In addition to Russia's role, Poland's absence from the Format was related to Ukraine's policy preferences, as the country did not perceive Poland as an equal partner and found direct contacts with Germany and France more beneficial for its strategic position (Interviews 10, 17, 25, 29; see also Buras, 2017, p.9; Zajac, 2016, p.148).⁸³

Nevertheless, the PO government remained committed to a multilateralist foreign policy and refrained from pursuing hard bargaining at the EU level. The strategy was explained by PM Tusk, who underlined that despite Poland's national interests, the country had to cooperate with the western partners because of their lack of understanding of the East and the dangers of the conflict with Russia (Kucharczyk and Fuksiewicz, 2015, p.107). The PO government adopted a cooperative strategy and was willing to make compromises whenever necessary to facilitate consensus at the EU level (Interviews 20, 29). Thus, the EU's role led the country to scale back some of its strategic objectives in order to support the common positions. PM Kopacz noted: 'It is vital to the national interest to prevent the West's position being watered down (...), but it is equally important to prevent Poland's isolation as a result of unrealistic

⁸³ Poland's attempts to participate in the talks were criticised as 'treating Ukraine as a Polish colony' by the Ukrainian media (Szeligowski, 2020a, p.218).

targets set by ourselves' (quoted in Baranowski and Cichocki, 2015, p.36). In this context, Poland moderated its strong advocacy for Ukraine in order to align with EU-level Ukraine initiatives. The PO government ratified the AA and provided bilateral support for the reform process in Ukraine in areas such as the devolution of power, municipal reform, countering corruption and de-oligarchisation (Interview 3). Simultaneously, however, it agreed to a compromise not to include a statement on Ukraine's EU accession perspective in the declaration at the EaP Riga Summit in May 2015 in the face of Germany's scepticism, which only acknowledged the partner states' European aspirations (Council of the EU, 2015; Lada and Wenerski, 2015, p.117).

Further, the government did not oppose the extension of the implementation of the DCFTA due to disagreements with Russia and refrained from unilaterally sending lethal weapons to Ukraine (Baranowski and Cichocki, 2015, p.36). While these steps demonstrated some differences between Poland's and the EU's common Ukraine policies, they exemplified that the government's strategic policy objectives remained compatible with the EU. Therefore, the differences between Poland and the EU, along with Poland's inability to fully shape the EU's common position according to its preferences, enable us to confidently exclude the no Europeanisation outcome, while Poland's broader alignment with the EU helps us eliminate the transformation, fragmentation and resistance outcomes (see Chapter 2). It could be argued that PO's EU-oriented foreign policy and bilateral contacts with Germany might have contributed to the moderation in Poland's position and led to strategic learning. However, learning was limited because Ukraine's EU membership remained the PO government's strategic objective, and EU-level efforts, while far from ideal, still reflected its broader

objectives. Thus, the PO government also resorted to strategic action and changed its foreign policy positions to align with less desirable EU-level initiatives to realise its primary objectives in the long term. As a result, the EU's influence on Polish foreign policy happened both through downloading and, to a lesser extent, cross-loading and produced adaptation, with strategic action and learning (albeit limited) functioning as the mechanisms of Europeanisation.

The PO government's efforts also focused on helping Ukraine in the security area, which aimed to strengthen the country's civilian security sector and reduce its dependence on Russian gas (Interview 1). They demonstrated Poland's broader agreement with EU-level initiatives and, in turn, their limited influence on the country's foreign policy. Poland, together with the UK and Sweden, was one of the proponents of deploying the EUAM to Ukraine immediately after Russia's annexation of Crimea (Emmott and Croft, 2014). It provided an opportunity for cross-loading due to Poland's active role in the formation of the initiative. Cross-loading was possible through strategic action rather than strategic learning because the initial supporters of the EUAM shared a similar objective of providing Ukraine with tangible assistance, which made strategic learning difficult. The EUAM's goals were ultimately limited due to differing positions among EU member states on the issue and fell short of Poland's more ambitious expectations (Novaky, 2015).⁸⁴ Thus, Poland also moderated its policy preferences and adapted to a more modest EU position through downloading after the EUAM became a part of the Union's official line. Additionally, Poland contributed to the EU's endeavours to assist Ukraine in reducing its energy dependence on Russia after 2014. Although the country did not have the necessary

⁸⁴ The EUAM aimed to provide advice for civilian security sector reform and coordinate of the work of the Ukrainian ministries work in this area (Interviews 11, 24, 29; see also Chapter 4).

infrastructure to play a more significant role,⁸⁵ its support was vital in helping Ukraine end imports of Russian gas by the end of 2015 (Interviews 1, 4). As such, it was another instance of Poland's alignment with the EU, illustrating the adaptation outcome of Europeanisation.

PiS's critical view of the EU mainstream

The PiS government's sceptical approach to the EU, the dominant role of Germany and France in the EU's policy towards the crisis and the re-emergence of historical issues with Ukraine limited Poland's role within the EU. Although these factors did not override Poland's commitment to the EU's common Ukraine policy, they led to the country's relative marginalisation in the EU (Interview 1; see also Balcer et al., 2016, p.15; Boffey and Davies, 2017; France24, 2017). PiS was critical of the PO government's policies towards the crisis.⁸⁶ Poland's diplomacy during the crisis was perceived as passive and indecisive by the PiS circles (Interviews 4, 10). In particular, FM Sikorski's mediation efforts and statements urging the Ukrainian opposition to sign the deal with Yanukovych were interpreted as capitulation and led to the belief that the government and the FM followed German instructions⁸⁷ (Interviews 4, 10; also Interview 24). Further, Poland's exclusion from the Normandy Format was seen as a failure of the PO government's diplomacy, with presidential candidate Duda promising to secure the country's participation in talks during the election campaign (Interview 27; see also

⁸⁵ Slovakia played a major role due to its larger capacity of reverse flows, accounting for 64% of Ukraine's imports, while Poland's share constituted 10% in 2019 (Enerdata, 2020).

⁸⁶ While some of the criticism was related to domestic political competition ahead of the presidential and parliamentary elections in 2015, the harsh rhetoric also reflected the two parties' different strategies on Poland's EU and Ukraine policies.

⁸⁷ The PO government saw it as part of the FM's strategy to unite the Ukrainian opposition against a common Russia threat (Interview 20).

Lada and Wenerski, 2015, p.124). A former PiS policy advisor (Interview 4) described Poland's foreign policy under PO as being 'subordinated to Germany and France and not about national interests', adding that it would have been surprising to see any policy 'contrary to German wishes'.

PiS's different policy-making style hardly changed the nature of Europeanisation of Polish foreign policy, as its persistence with a cooperative strategy ensured that Poland would largely align with the EU's common line. The government's criticism of the EU mainstream and Poland's exclusion from the Normandy Format led to its search for partners and alternative formats within the EU and created opportunities for the cross-loading dimension of Europeanisation. In this regard, Poland tried to cultivate stronger ties with the UK to advocate more EU support for Ukraine and tougher policy towards Russia (Interview 3; see also Buras, 2017, p.4; Zuba, 2021, p.405). The policy was also driven by the PiS government's desire to reduce Germany's role and counterbalance it within the EU (Interviews 4, 10).⁸⁸ 'I do not think that there was much feel for making sure that Poland would be anchored in the club of the main decision-makers in Europe', stated a former Polish diplomat (Interview 3), highlighting the limitations of PiS's Eurosceptical foreign policy. A former Polish policy-maker (Interview 20) remarked:

They [PiS] were not totally interested in developing any deep relations with France and Germany. They focused on relations with the US, and in Europe, the UK and, of course, Viktor Orban ... Poland stopped playing an important role within the EU because it was a political decision of Mr Kaczynski and his party, who didn't want deeper European integration.

⁸⁸ However, the UK's decision to leave the EU left the PiS government without powerful allies (Interviews 3, 20).

Further, the PiS government sought close cooperation with the US mainly due to security concerns, and its regional coalition strategy was strongly supported by the Trump Administration (Interview 10). However, Poland's regional endeavours, such as the B9 and the TSI, were considered ineffective despite the government's efforts to create a strong group of the CEE countries to increase the region's competitiveness against Germany (Interviews 1, 4). 'Last eight years, our own consideration rooted in the CEE region. It was stupid and ineffective ... We placed ourselves a bit outside, in a specific competition with the core of the EU', remarked a former senior Polish diplomat (Interview 1), adding that even though PiS declared support for Ukraine as its strategic objective, it did not propose anything and excluded the country from the TSI. Another former Polish diplomat (Interview 29) noted, 'All these initiatives and ideas were already floating around in 2014 before the PiS government, but they got more important during that [PiS government] period', continuing, 'PiS's policies within the EU were problematic, particularly towards Germany ... The problem, in my opinion, lies in the fact that there were too many platforms but not so much substance'. Thus, the lack of support from the EU and Germany made other participant countries sceptical about the prospects of the TSI and restrained Poland's ambitious expectations from alternative formats (Buras, 2017, p.8).

In addition to the PiS government's EU strategies, structural challenges were also difficult to overcome for Poland. Namely, EU-level Russia and Ukraine initiatives mainly reflected the preferences of France and Germany (Interviews 1, 2, 3, 4, 24). Thus, other member states' influence remained limited, and they had to, albeit sometimes reluctantly, adapt their national policies to the EU's common line. A former Polish diplomat (Interview 24) highlighted how other countries were sidelined by the Franco-German partnership: 'At that time, you could not

break through this bubble, in Warsaw people thought this was, pardon my French, bullshit'. Despite Poland's intention to increase engagement with the EaP and Ukraine, the Five Guiding Principles of the EU's relations with Russia demonstrated a compromise and double-track approach at the EU level, which was far from Poland's strategic objectives (see Chapter 4; Interview 3). Thus, Poland considered the EU's Ukraine policy 'ineffective but at the same time difficult to change' (Interview 17).

Consequently, the developments displayed differences between the PiS government's preferred policy positions and the EU's common Ukraine policy. Poland struggled to have a considerable influence, which, combined with the PiS government's EU-level policies and worsening relations with Germany, restricted the role of strategic learning from the EU mainstream through cross-loading at the national level. While admittedly, the government's engagement with the alternative regional groups within the EU indicated Europeanisation through cross-loading, it did not induce considerable changes in Poland's foreign policy. Nor did it produce strategic learning, as it ultimately limited Poland's role in the EU's Eastern policy and largely reflected the government's existing policy line (see Buras, 2017, p.8; Interviews 1, 15, 20). The empirical evidence of the differences between the PiS government's strategic objectives and the EU's common line eliminates the no Europeanisation outcome. The EU's influence on Poland's foreign policy occurred primarily through downloading, with the PiS government making modest changes to its national position to align with the EU's common line, without altering its strategic objectives. This reflected the adaptation outcome of Europeanisation. As the government's broader priorities aligned with the EU, Poland did not need to transform its national policy, oppose the EU's common line or advance independent

objectives that conflicted with those of the EU, meaning that the transformation, resistance and fragmentation outcomes of Europeanisation can be discarded. Concerning transatlantic cooperation with the US in explaining changes in Polish foreign policy, it contributed to the PiS government's objective of creating alternative regional coalitions within the EU but had no direct role in its foreign policy towards Ukraine (see this section). Considering that the moderation in Poland's more ambitious objectives towards Ukraine continued throughout the 2014–February 2022 period, even in the context of the US-backed regional initiatives, the significant American role in explaining changes in Poland's foreign policy can be excluded.

Enduring commitment amid bilateral issues

PiS's greater emphasis on historical issues in Poland's relations with its neighbours and the nation-building process in Ukraine after 2014 threatened Poland's continuous advocacy for Ukraine in the EU. Ukraine's de-communisation laws included recognising the OUN and UPA as organisations fighting for the country's independence and making it a crime to deny and disrespect their role in the process⁸⁹ (Bateson, 2017; Stewart, 2015; Szeligowski, 2020b, pp.139-140). Poland responded by adopting a parliamentary resolution in 2016 that recognised the Volhynia massacre as a genocide committed by the Ukrainian nationalists against Polish people (Zajackowski, 2017, p.184), with FM Waszczykowski underlining that Ukraine 'will not enter Europe with Bandera' (quoted in Spzh, 2017). Ukraine's ban on the exhumation of the Polish victims of Volhynia added to the dispute, as bilateral talks and

⁸⁹ It coincided with Polish President Komorowski's official visit to Kyiv and did not receive a serious backlash from the PO government (see Zajac, 2016, p.149).

President Duda's visit to Ukraine failed to change Ukraine's decision on the issue (Szeligowski, 2020c, pp.139-143). 'There was an expectation in the Polish media and discourse that in exchange for Poland's advocacy of Ukraine's interests and Ukraine being a bit more anchored in the West, Ukraine should revise its memory politics', highlighted a former Polish diplomat (Interview 3), noting that the glorification of the Ukrainian nationalists was difficult to understand in the Polish context. 'You had this pre-Giedroyc sentiment, kind of paternalistic and geo-sentimental thinking that the West is good and the East is bad', explained a former policy advisor (Interview 15), noting that the PiS government was not much active in Ukraine policy until February 2022.

Nevertheless, Poland's strategic policy objectives did not change under the PiS government, as the country remained committed to supporting Ukraine within the EU and NATO. PiS did not resort to the conditional dissent strategy and avoided hard bargaining with Ukraine or the EU to address bilateral issues. Its cooperative strategy ensured Poland's continuous alignment with the EU, even though Europeanisation did not produce significant changes in the country's foreign policy. A Polish policy expert (Interview 27) noted that one of Poland's goals, regardless of the government in power, was to agree on the most comprehensive and deepest trade agreement with Ukraine, which would effectively place the country on a European path. Underlining PiS's focus on historical differences with Ukraine for domestic political purposes, a former Polish diplomat (Interview 29) stated: 'I have never seen this directly influencing cooperation'. Thus, despite difficulties in bilateral relations, FM Waszczykowski viewed a politically and economically powerful Ukraine as essential for European security and emphasised the development of the Polish-Ukrainian partnership as a strategic policy

objective for Poland's foreign policy (Szeligowski, 2020c, p.141). Poland's firm support for Ukraine was reiterated in bilateral meetings, with the Joint Declaration in 2021 underlining the European perspective of Ukraine (The official website of the President of the Republic of Poland, 2021). While these measures were considered insufficient and one of the many steps in Ukraine's integration into the EU (Interview 24; Zajackowski, 2017, p.203), the PiS government saw them as vital for improving bilateral economic cooperation (Interview 3). Even at times when Ukraine's democratisation faced challenges, Poland remained committed to supporting the country, with one former Polish diplomat (Interview 24) noting, 'You got an impression that we kind of were more Ukrainian than Ukrainians themselves, even in 2014'.

Poland's bilateral efforts were buttressed by its strong backing for Ukraine at the EU level, as the government pushed to finalise the DCFTA and visa-free travel agreements with Ukraine (Interviews 3, 27). The PiS government also continued cooperation with Ukraine through the EaP, with FM Czaputowicz proposing stronger institutionalisation of the initiative by creating the EaP secretariat and rotating presidency (Kubiak, 2019). Poland was very active in promoting Ukraine's case during the EU-Ukraine and the EaP summits. 'There was a strong understanding that you should agree on the most ambitious language possible', a former diplomat (Interview 3) recalled preparations for the EU-Ukraine Summit in 2016, adding, 'Poland was among those that wanted to grant Ukraine a very close and very direct European perspective'. Although the PiS government pursued different EU-level strategies, it, like its PO predecessor, failed to include a clear EU membership perspective for Ukraine in any final EU statement before February 2022. The EU-Ukraine summits and the EaP Joint Declarations used less ambitious language by underlining the partner countries' 'European aspirations' and

‘European choice’ rather than a clear path to the EU membership (see Balcer, 2021). However, the EU’s broader Ukraine policy did not contradict PiS’s strategic policy objectives, and historical issues with Ukraine did not take precedence over the government’s goal of supporting the country against Russia. Thus, PiS remained cooperative and accepted a less favourable EU line by modifying its national policy despite its largely Eurosceptical position. This meant that Poland strategically adapted its foreign policy due to the EU’s common Ukraine policy by downloading from the EU level.

The PiS government continued PO’s policy of supporting Ukraine in the security area, with the Ministry of Defence having ‘the most vibrant and deepest cooperation with Ukraine for obvious reasons’ (Interview 29). Poland, together with Lithuania, brought a trilateral brigade with Ukraine (LITPOLUKRBRIG) (established outside of the EU structures) to an operational level in 2016 to collaborate with the country in the military sphere and help it bring its armed forces closer to NATO standards (Fryc, 2020; Ponomarenko, 2017). The trilateral cooperation was reinforced by the launch of the Lublin Triangle in 2020, which aimed at supporting Ukraine’s European and Euro-Atlantic ambitions and coordinating the three states’ policies in international organisations (Bornio, 2020). While Poland refrained from providing lethal weapons to Ukraine until 2022 (see Marzalik and Toler, 2018), these initiatives, which did not become a part of the EU’s common line, demonstrated the PiS government’s cross-loading efforts through cooperation with like-minded states. However, Poland’s and Lithuania’s similar national priorities produced limited changes in Poland’s foreign policy and meant that strategic action was the main mechanism of this limited Europeanisation. Further, Poland and Ukraine signed an agreement in 2019 to increase the interconnector capacity between the two

countries, which was intended to strengthen Ukraine's energy independence (Ukrainian Energy, 2019). It reflected a general trend of both Polish governments' alignment with the EU on Ukraine-related initiatives and the adaptation outcome of Europeanisation in Poland's foreign policy.

6.2.3. Strategic alignment with limited adaptation (February 2022–June 2024)

Ukraine's failure to withstand the Russian invasion could have meant Russia on Poland's borders and might have turned the country's worst nightmares into reality (Interview 10). Thus, both governments in power following February 2022 committed to supporting Ukraine with all the necessary means despite unresolved issues in bilateral relations. Simultaneously, the EU's common Ukraine policy became more resolute than during the 2014–February 2022 period. While some of Poland's early proposals, such as Ukraine's EU candidacy and military support for the country, were initially met with scepticism and only gradually embraced by member states and the EU, the nature of the crisis put significant pressure on them and gradually brought their policies in line with Poland's position. In turn, this enabled Poland to advocate more ambitious EU support for Ukraine. PM Morawiecki highlighted Poland's broader approach to the war: 'There can be only one outcome: either Ukraine wins or the whole of Europe loses' (quoted in PAP, 2022). In this sense, Poland's Ukraine policy was guided by three essential strategic objectives: providing diplomatic support, increasing military assistance and supplying financial and humanitarian aid. As these objectives were mostly compatible with EU-level Ukraine initiatives, Poland did not have to significantly alter its national policy due to the Union's influence. Even when the EU was slow to take action, Poland

remained mostly cooperative by adapting to the proposed policies without disrupting the EU line. As a result, there was limited EU influence and pressure on Poland's Ukraine policy in this period, and the Europeanisation of the country's foreign policy was in the form of minimal adaptation.

Polish diplomacy and support for Ukraine's EU accession

Russia's full-scale invasion of Ukraine signified the failure of the Franco-German policy that dominated the EU's Eastern policy between 2014 and February 2022. At the time of temporary paralysis and uncertainty, Poland was better organised to react to the crisis and unify other member states in providing support for Ukraine (Interviews 4, 24, 26). FMs Rau and then Sikorski described Poland's unequivocal support for Ukraine as vital for Poland's and Europe's security and Poland's *raison d'état* (Polish Ministry of Foreign Affairs, 2023, p.33, 2024, p.7). A former senior Polish diplomat (Interview 10) remarked, 'Many of our European colleagues expected that Ukraine cannot be saved and accepted the eventuality of the Georgian scenario in Ukraine in the first two to three weeks of the war', which was not an option for Poland because 'the eventual collapse of the Ukrainian state would be a catastrophe for our [Poland's] strategic position'. A former PiS policy advisor (Interview 4) compared Poland's and Germany's early responses to the war:

The former ambassador of Ukraine in Berlin was concerned when the Germans told him that Ukraine would collapse in three days after the invasion, and there was no sense to support it⁹⁰... So, this period between February 2022 and March 2023 could be characterised as the lower German and higher Polish influence in the region.

⁹⁰ See The Kyiv Independent (2022) for the Ukrainian ambassador's remarks.

The PiS government's alignment with the EU and consistent calls for a firmer common position (Interview 25) indicated its cooperative strategy, which could be explained by the fact that EU-level Ukraine initiatives were still largely compatible with its strategic policy objectives despite certain shortcomings. Unlike Hungary, Poland did not oppose EU-level Ukraine initiatives to achieve the release of its frozen €59.8 billion in pandemic recovery grants and loans and €76 billion in cohesion funds due to the rule of law concerns,⁹¹ meaning that the PiS government largely refrained from conditional dissent and hard bargaining. However, PiS's difficult relations with the EU and Germany limited Poland's potential leadership position within the EU (Buras, 2023b). 'Saying that we were right or saying that we have warned you does not mean there was a policy behind this', remarked a Polish policy expert (Interview 25), while Buras (2023a) noted that 'being in the centre is not the same as shaping the EU agenda'. PiS remained relatively hesitant in actively collaborating with Germany and France despite several joint efforts within the EU (Interviews 1, 4, 15, 20). While this did not prevent cross-loading (see this section), the government's firm stance and opposition to the EU mainstream and Germany limited strategic learning as a Europeanisation mechanism.

The PiS government actively cooperated with like-minded CEE countries to promote Ukraine's cause within the EU from the outset of the war, when the Union's early Ukraine policy did not match its more ambitious strategic objectives. The empirical evidence demonstrates differences between Poland's national position and the EU's common line, thereby eliminating the potential argument for the no Europeanisation outcome. Only four days after the invasion,

⁹¹ The breakthrough was achieved only after the PO government began implementing necessary measures to ensure the judicial independence following its assumption of power in December 2023 (Polish Ministry of Development Funds and Regional Policy, 2024).

President Duda and the Presidents of seven CEE countries signed an open letter advocating for Ukraine's swift candidacy to the EU (The official website of the President of the Republic of Poland, 2022). It was supported by the Sejm resolution calling for the EU to grant Ukraine candidacy status (Krzysztozek, 2022). However, this position did not initially gain traction among other member states, with Germany, France, Italy, Spain and the Netherlands considering Ukraine's accession as a long-term prospect and instead favouring cooperation through the AA and providing military, humanitarian and financial assistance (Lynch and Vela, 2022c; Vela and Sheftalovich, 2022). Further, the Versailles Declaration refrained from making any commitments regarding Ukraine's candidacy and only acknowledged the country's European choice and aspirations (European Council, 2022a). The language of the Declaration was short of Poland's expectations, with PM Morawiecki accusing some member states of slowing down the process (Morawiecki, 2022b). 'The EU initially did not understand Ukrainian aspirations, which is why support for Ukraine was late', remarked a former senior Polish diplomat (Interview 26), underlining the common view among the PiS policy circles, 'Germany counted on the quick fall of this state, which for them was weak, corrupt and seasonal. The unquestionable Polish support for Ukraine and the diplomatic offensive of PM Morawiecki awakened a basic sense of justice in western Europeans'.

In coordination with the Commission and the Council, PiS leader Kaczynski and PM Morawiecki were among the first EU leaders to visit Kyiv in March 2022, where both reiterated Poland's and the EU's unequivocal support for Ukraine (Boffey and Rankin, 2022). Further, Polish FM Rau joined the CEE countries and Ireland to push for Ukraine's candidacy status ahead of the EU Council meeting on 24–25 March, which was met with scepticism by member states

opposing the proposal (Vela and Lynch, 2022b). It was followed by President Duda's trip to Kyiv together with the presidents of the Baltic States in April and with the President of Slovakia in May, in both of which he urged the reluctant member states to support Ukraine's EU candidacy (Euronews, 2022b; UBN, 2022). The coordination efforts with like-minded member states regarding Ukraine's EU accession demonstrated cross-loading dynamics in the Europeanisation of Poland's foreign policy. However, they were mainly intended to steer the EU's common policy and did not result in considerable changes in Poland's national policy preferences. Thus, strategic learning remained limited due to the PiS government's almost similar policy position with fellow member states on the issue. Consequently, cross-loading resulted in minimal adaptation. Strategic action was the main mechanism of Europeanisation, as it was a straightforward decision for the government to follow the EU-level policies that did not contradict its strategic policy objectives.

Gradually, consensus within the EU shifted towards granting Ukraine candidacy status with the intensification of Russia's aggression. 'I remember the meeting in Paris in the summer of 2022, and the question of the so-called candidacy status for Ukraine appeared, and that discussion was quite surprising', noted a former senior Polish diplomat (Interview 10), adding that France's and Germany's positions on the issue became increasingly closer to Poland's stance. While Poland's endeavours contributed to the change in the EU's position on the candidacy issue, the breakthrough came only after Chancellor Scholz, President Macron and PM Draghi visited Kyiv in June 2022, as the Commission's recommendation was followed by the Council decision after they met with President Zelenskyy (Herszenhorn, 2022a; Olearchyk, Mallet and Chazan, 2022). The decisive shift in the EU position after the involvement of Germany, France

and Italy showed that Poland had to temporarily adapt to the pace of the process by moderating its far-reaching objectives and could not fully dictate the EU's common foreign policy. Thus, the Europeanisation of Poland's foreign policy also happened through downloading directly from the EU level. Poland's strategic action consisted of adapting to relatively suboptimal EU-level initiatives (e.g., acknowledging Ukraine's EU aspirations short of a clear membership perspective in the early period of the war) while also patiently advocating for Ukraine's candidacy status. As the EU's position increasingly reflected Poland's strategic objectives on Ukraine's candidacy, and the country did not resist the EU's common line or follow a contradictory national position, the transformation, resistance and fragmentation outcomes of Europeanisation can be excluded (see Chapter 2). Consequently, the EU's influence led to limited changes in Poland's foreign policy and produced minimal adaptation.

Polish foreign policy did not see an alternative to Ukraine's EU candidacy and even pushed to fast-track the country's EU accession process (Herszenhorn et al., 2022). The objective was articulated on multiple occasions, including by President Duda at the meeting of the Weimar Triangle in June 2023 (The official website of the President of the Republic of Poland, 2023). After the October 2023 election, the new PO government continued this policy, with PM Tusk backing the December 2023 EU Council decision to open accession talks with Ukraine and FM Sikorski remarking on Poland's intention to see the country as an EU member by 2030 (Ukrainian World Congress, 2023; VOAnews, 2023). In contrast to PiS, however, the new PO government was more open to close contacts with the EU mainstream. A Polish policy expert (Interview 15) described the government change after the election as 'a major shift and massive change of policy': 'You have a pro-European government, and it is in the co-deciding

seat in the EU in many topics. So, it is a major game-changer when it comes to the perception of what kind of partnership you can have.’ ‘We politically came back to the core of the EU politics with this new Tusk government after eight years of being out’, stated a former senior Polish diplomat (Interview 1), emphasising Poland’s more active role in EU policy-making. One former senior Polish diplomat (Interview 26) compared the PiS and PO governments’ reactions to the war: ‘The Morawiecki government’s reaction was immediate, the Tusk government’s reaction is the result of reflection and discussion in the EU’.

After taking power, PM Tusk criticised Hungary’s Ukraine policy by describing PM Orban as ‘the only politician who is so clearly anti-Ukrainian’ (quoted in Yahoo, 2024) and attempted to revive the Weimar Triangle by coordinating more with France and Germany. At the meeting with his German and French counterparts in March 2024, PM Tusk underlined the common agreement among the partners on ‘immediate and intensive’ support for Ukraine (quoted in TVP World, 2024). In this sense, the PO government’s strategic policy objectives did not significantly differ from those of the PiS government. Changes in the policy-making style and improved relations with EU partners signified the Tusk government’s different tactics rather than Poland’s new approach to the EU’s Ukraine policy (Interviews 26, 27, 29). The PO government’s pro-European foreign policy created opportunities for cross-loading with the Weimar Triangle and the EU mainstream. However, the Union’s influence on Poland’s foreign policy remained limited due to the substantial convergence of interests between the national and the EU levels, with a largely cooperative strategy upheld by the new government and strategic action continuing to act as the main Europeanisation mechanism.

In terms of alternative explanations, one could argue that changes in Poland's foreign policy were also driven by the country's close partnership with the US, given the PiS government's prioritisation of relations with the Americans on security matters (Interviews 4, 10, 20). FM Sikorski criticised PiS's foreign policy strategy by accusing it of 'making miscalculations about an alliance with the US against the European Union' (Polish Ministry of Foreign Affairs, 2024).⁹² However, the PiS government's close security interests and cooperation with the US (Interviews 10, 20, 29; see also Dyduch and Gora, 2024, p.307) did not affect Poland's position towards EU-level Ukraine initiatives and were not an alternative to Europeanisation for two reasons. First, Poland had already been largely aligned with the EU's common foreign policy towards Ukraine, indicating that the US's reaction to the war and support for Ukraine hardly impacted the direction of the country's foreign policy. Second, despite the PiS government's Atlanticism, relations between Poland and the Biden administration soured due to ideological differences (Dyduch and Gora, 2024, p.309), which also indirectly limited the US's influence on Poland's Ukraine policy. A former PiS policy advisor (Interview 4) argued, 'In accordance with the ideological character of the Democrats in the US ... their approach to the conservative Polish government ... it appeared that they supported the German will to change the government in Poland', adding, 'We can understand all those differences in our approach to cultural issues, but hard security interests of our countries are similar and should be in line with the mutual relations; it appeared that it was not'. Hence, there is no tangible evidence to suggest that limited changes in Polish foreign policy were driven by the US's influence.

⁹² FM Sikorski also highlighted the limitations of PiS's EU policy by noting that Poland has to 'fix its relationship with Brussels and Berlin' to assume a leading role within the EU (quoted in Minder and Pitel, 2023).

Comprehensive support in military, humanitarian and financial areas

Poland's pledge to support Ukraine militarily for 'as long as it takes' was reaffirmed by Polish officials on numerous occasions (Foy, Abboud and Schwartz, 2023; PAP, 2022). PM Morawiecki asserted, 'The era of geopolitical naivety has given way to an era of geopolitical realism', adding, 'The commitment to support Ukraine must not weaken but grow stronger' (Morawiecki, 2023). Poland's cooperative strategy led to its engagement with the EU and fellow member states, even though the PiS government was dissatisfied with the Union's common action. The empirical evidence indicates that Poland's policy was closely aligned with the EU's common line, and, at times, went even further, thereby discarding the transformation, fragmentation and resistance outcomes of Europeanisation. However, there were differences between Poland's more proactive position to support Ukraine militarily and the EU's slower reaction, requiring compromises and meaning that the no Europeanisation outcome can also be eliminated.

To an extent, Poland's intention to lead in providing military assistance to Ukraine was driven by its disillusionment with the western policy and growing dissatisfaction with Germany's slow response (see Fried and Korewa, 2023). PM Morawiecki criticised France's and Germany's military commitment to Ukraine, stating that they 'want a quick cease-fire ... almost at any price', adding that they 'have not demonstrated serious international moves' in terms of providing military assistance (quoted in Grady, 2023). A former Polish diplomat (Interview 24) noted that Poland had to make its own decisions due to the disappointment with the flawed western European policy before February 2022: 'If it were not for those decisions, I would be

blunt, I think Ukrainians would have lost'. Poland eagerly pushed to host one of the EUMAM headquarters in its territory, which led to some delays in the agreement due to Germany's concerns about Poland's hawkish position regarding Russia (Brzozowski, 2022). The agreement was reached after the division of labour was achieved between the two countries (see section 5.1.2). It showed that despite the PiS government's criticism, Poland cooperated with Germany and was prepared to agree on common initiatives to support Ukraine, which reflected the cross-loading dimension of Europeanisation. By the summer of 2024, Poland provided combined arms training to thirteen thousand Ukrainian troops through the EUMAM, which was reinforced by an intergovernmental agreement to train Ukrainian volunteers in Poland (The official website of the President of the Republic of Poland, 2024; Zalesinski, 2024).

Poland became a transit hub for delivering western weapons to Ukraine and was only behind the Baltic States in per capita military aid to the country (Francis, 2023). While the delivery of different types of weapons systems was made through bilateral channels, the existence of the EPF incentivised member states to send weapons to Ukraine, with Poland demanding the increase of the EPF fund and aiming to partially reimburse its donations⁹³ (Dyduch and Gora, 2024, p.310; Foy, 2023a; Bayer and Barigazzi, 2023). Thus, the EU's role led Poland to download the common policy (i.e., EPF) and produced the adaptation outcome of Europeanisation, with minimal changes in the country's policy position due to the increasing overlap between the national and the EU levels.

⁹³ Poland was expected to receive around €500 million of its €4 billion military assistance from the EU in case Hungary lifted its EPF veto (Notes from Poland, 2024c).

In the early stages of the war, Poland immediately sent, inter alia, air defence missiles, howitzers, self-propelled rocket launchers and T-72 tanks to Ukraine (Adamowski, 2022; Morawiecki, 2023; see also Fella, 2024, pp.46-48; Mills, 2024, pp.63-64). Further, Poland became the first western country to provide Ukraine with fighter jets by sending its Soviet-era MiG-29s to the country (Dickinson, 2023).⁹⁴ The bilateral assistance was complemented by its support for capability coalitions aiding the Ukrainian military. Europeanisation through cross-loading was evident in the PiS government's leading role in the creation of the tank coalition. This coalition was part of the Ukraine Defence Contact Group and also required increased coordination with the US and NATO (see Machi, 2022; Martin, 2024; Seligman and McLeary, 2023). A former senior Polish diplomat (Interview 10) explained the thinking process in Poland: 'Each Russian tank destroyed in Ukraine will not appear in Poland, and that was the core of the Polish decisions during that time'. 'It was not lip service; it was very tangible', stated a former PiS policy advisor (Interview 4), comparing Poland's assistance with Germany, 'The Germans deliberately mixed deliveries and commitments. They presented commitments as something that was already delivered'.

Poland pressured Germany to gain permission to re-export its Leopard tanks to Ukraine, with PM Morawiecki pointedly asserting, 'Even if we did not get this approval ... we would still transfer our tanks together with others to Ukraine' (quoted in Jamieson, 2023). The PiS government was particularly critical of Germany's decisions regarding military support to Ukraine, who, for its part, permitted the delivery of its Leopard tanks to Ukraine only after the US pledged to send Abrams tanks (Shapiro and Puglierin, 2023). 'We forced Germany to

⁹⁴ See Oryx (2022) for the full list of heavy weapons supplied to Ukraine.

transfer the Leopards to Ukraine’, commented a former PiS policy advisor (Interview 4), adding, ‘The Germans preferred to create a situation in which they stepped back. It was easier and more prestigious for them to accept that they were under the American pressure than the Polish pressure’. In this regard, the PiS government’s criticism of Germany was persistent, with President Duda accusing the country of failing to keep its promise of sending new tanks to Poland to replace Soviet-era tanks and PM Morawiecki urging it to be more generous in supporting Ukraine (Bayer and Barigazzi, 2023; von der Burchard, 2022a).

The empirical evidence shows that, if at all, policy transfers happened from Poland to Germany rather than vice versa, particularly during the PiS government. While strategic learning was limited during both governments due to Poland’s consistently assertive approach to Ukraine-related issues, it was further constrained by PiS’s pressure on Germany to take more decisive steps to support Ukraine, such as in the case of the tank coalition. The involvement of the US and NATO could potentially lead to an argument that they played a more decisive role in generating minimal changes in Poland’s foreign policy. However, the Contact Group was in the form of an ad hoc coalition of the willing, lacked formal institutional mechanisms, and its efforts were strongly backed by the EU through the EPF, statements by senior EU officials and the Council conclusions (European Council, 2024b; Ukrainska Pravda, 2023; Ukrinform, 2023). Therefore, while the EU was not directly involved in the Contact Group, its institutional structure provided a platform for cross-loading (the EU’s indirect role) between Poland and Germany. Thus, Poland’s joint efforts with its EU partners were not the consequence of the direct influence or pressure from the US or NATO, which played rather a facilitating role in the process.

Poland's support for the Czech-led initiative to address Ukraine's ammunition shortages demonstrated the same Europeanisation pattern through cross-loading. The PO government backed Czechia's plan to buy 800,000 artillery shells for Ukraine from outside the EU (Fiala, 2024), with FM Sikorski expressing Poland's logistical and financial support and willingness to double its contribution (Andreikovets, 2024; Reuters, 2024a). Although Poland's financial support for the initiative was delayed, FM Sikorski pledged €100 million in support over the next two years (PAP, 2024). While the plan was not led by the EU, it was endorsed by the Council (European Council, 2024b), which facilitated coordination and showcased the growing relevance of cross-loading efforts within the EU but outside of its institutional structures (see Chapter 2). Strategic action remained the main mechanism of Europeanisation, as the Czech initiative was not considerably different from the PO government's strategic objective to promote and support initiatives assisting Ukraine. Hence, room for policy learning and transfers was limited, and changes in Poland's foreign policy was marginal.

Regarding humanitarian assistance, Poland was one of the leading EU states supporting Ukraine, with the country hosting the largest number of Ukrainian refugees after Russia's full-scale invasion (Ministry of Foreign Affairs, 2024). The government ministries provided €16 billion for Ukraine and Ukrainian refugees in humanitarian aid (Polish Ministry of Foreign Affairs, 2024, p.22). Moreover, the EU's TPD was complemented by the Act on the Assistance to Ukrainian Nationals, which helped provide permanent shelter for 950 thousand Ukrainian refugees by 2024 (Lysienia, 2023, p.184; Ministry of Foreign Affairs, 2024, p.9). In this context, there were no considerable differences between Poland and the EU, which indicated

Europeanisation through downloading, leading to the adaptation outcome and resulting in minimal changes in Poland's national position. In terms of financial support, Poland backed the EU's assistance to Ukraine through MFA programmes and the €18 billion MFA+ instrument for 2023. Although the Morawiecki government initially opposed the MFA+ due to a package deal that involved a global minimum corporate tax rate plan in December 2022, Poland ultimately agreed to the proposal (Strupczewski, 2022b; Tamma, 2022d). The PiS government did not resort to the conditional dissent strategy through veto threats or delaying tactics to achieve a favourable agreement, which could be explained by the fact that support for Ukraine occupied a higher place among its strategic policy objectives than potential gains from such a move.

Further, under the Tusk government, Poland supported the €50 billion Ukraine Facility for 2024–2027,⁹⁵ which was bolstered by bilateral assistance, as the country spent 4.92% of its GDP on Ukraine assistance (The official website of the President of the Republic of Poland, 2024). Poland froze more than a billion euros of Russian assets; however, the country's efforts to achieve the EU's confiscation of Russian central bank assets and their use to support Ukraine failed to garner enough support among other member states (Kholodnova, 2023; Notes from Poland, 2023c). The proposal was met with scepticism by several EU members, such as France and Germany, who favoured using only the proceeds from immobilised Russian assets (Arnold et al., 2023; Rappeport, 2023). Ultimately, the EU agreed to provide direct military support for Ukraine using windfall profits from the frozen Russian assets through the EPF and Ukraine Facility (Council of the EU, 2024b). It was another instance in which Poland was unable to

⁹⁵ The PM criticised Hungary's negotiation tactics as PM Orban's 'strange and egoistic game' (quoted in Gozzi and Rainsford, 2024).

realise its more ambitious strategic objectives due to a lack of consensus among EU member states. Thus, the PO government's strategic action involved subscribing to a less optimal common position while continuing to advocate more resolute action, signifying the adaptation outcome of Europeanisation through downloading.

Ukrainian agricultural exports and bilateral issues

The deterioration of bilateral relations over imports of Ukrainian agricultural products and historical differences from mid-2023 could signal Poland's opposition to EU-level Ukraine initiatives and no Europeanisation. Both Polish governments in power after the war's outset were against the EU's Solidarity Lanes and ATMs to help Ukraine export its agricultural products and provide financial assistance to the country by suspending all import duties on goods (see Apelblat, 2023; Dodd and Welsh, 2024; EU Commission, 2024a). Initially, the PiS government, together with Bulgaria, Hungary, Romania and Slovakia, agreed with the EU Commission in April 2023 to ban the imports of certain Ukrainian agricultural products while allowing their transit to third countries (Kijewski and Brzezinski, 2023). However, with the EU not extending the agreement beyond September 2023, the Morawiecki government unilaterally imposed an import ban on Ukrainian agricultural goods to protect the domestic market from cheap and unfair competition (Notes from Poland, 2023d). 'The Commission just completely bypassed countries and basically started advocating the case of Ukrainians', highlighted a former Polish diplomat (Interview 24), adding, 'But Ukraine is still not a member of the EU. So, you expect the Commission to represent the interests of member states, and in Warsaw, the feeling was that they were doing the opposite'. A former PiS policy advisor

(Interview 4) interpreted the Commission's decision as a 'help change the government in Poland' because Poland was put in a position in which 'the government had to act independently of the Commission decision, thus provoking accusations of breaking the European law due to foreign trade being an exclusive Commission competence'.

Despite securing a concession from the EU in the form of tighter control of Ukrainian exports, the PO government also kept the ban in place after taking power in December 2023 (Minder and Bounds, 2024).⁹⁶ The issue was considered important by both governments due to its impact on the domestic market and farmers' protests (Interviews 4, 24; see also Beattie, 2024). This exemplified the Polish governments' preparedness to protect their strategic objectives when faced with challenging EU-level policies. The indicators of the conditional dissent strategy were visible, as the PiS government sought the EU's extension of its temporary ban before taking unilateral action, while the PO government kept restrictions in place even after obtaining a concession from the EU (Fleming, Bounds and Minder, 2024; Notes from Poland, 2023d). Consequently, Poland's eventual unilateral ban went against the EU rules and suggested no Europeanisation on this issue. However, due to trade being the Commission's competence and a lack of unanimous decision-making, hostage-taking was not possible.

Difficulties in bilateral relations also led to ambiguous rhetoric about Poland's support for Ukraine. During the PiS government, Polish deputy foreign minister Jablonski stated that 'It is hard to imagine' Ukraine joining the EU without the exhumation of the Volhynia victims

⁹⁶ The EU agreed to control the import of Ukrainian goods if they caused a decrease in prices in Poland and other neighbouring states (Fleming, Bounds and Minder, 2024).

(quoted in Notes from Poland, 2023c). PM Morawiecki's statement that 'We are no longer transferring weapons to Ukraine, because we are now arming Poland with more modern weapons' was misinterpreted and later clarified as concerning only new weapons systems (quoted in Radford and Easton, 2023; see also Kononczuk, 2023). After forming the government in December 2023, PM Tusk sought to ease tensions with Ukraine and supported Ukraine's EU accession by promising to coordinate with President Duda to fully support the process (Notes from Poland, 2024a). Further, the Polish government consistently emphasised unwavering support for Ukraine and its EU and NATO prospects despite trade disputes, with PM Tusk describing Poland as Ukraine's best ally and noting the cross-party consensus on the issue (Krzysztozek, 2024a).

Nevertheless, PM Tusk's commitment to Ukraine's EU accession and attempts to improve bilateral relations were accompanied by statements emphasising the government's willingness to protect its strategic objectives (see Prochwicz-Jazowska, 2024). In particular, the re-emergence of historical issues raised doubts about Poland's support for Ukraine. 'Ukraine will not become a member of the European Union without Poland's consent', stated PM Tusk, adding that the country should first reach, *inter alia*, 'cultural-political standards' (quoted in Kosc, 2024). This coincided with President Zelenskyy's accusation against Poland for its lack of support in accession talks and military assistance and FM Sikorski's scepticism over Ukraine's quick EU accession and emphasis on resolving historical differences between the two countries (Khalilova, 2024; Mularczyk, 2024). 'Ukraine thought that there was a parliamentary campaign in Poland, and therefore the relations are so tense', commented a Polish policy expert (Interview 27), noting, 'This was a mistake in the sense that nothing changed. There are not

many differences between PiS and PO, and even on historical issues, the view is more or less the same among the Polish political elite’.

Ultimately, Poland’s challenge to the EU over Ukrainian agricultural exports, historical issues and periodic harsh rhetoric casting doubt on the country’s EU membership prospects did not affect its overall support for Ukraine within the EU. The main reason was that, despite their intentions to protect national priorities, these issues did not override the Polish governments’ strategic policy objectives (Interviews 1, 20, 27, 29), as they largely isolated these issues from their broader policies towards Ukraine. As one former Polish diplomat (Interview 24) stated, ‘It was a strategic decision [to support Ukraine]. Okay, Ukrainians kind of tried to pretend it did not really happen, but it did happen. So, for us, this was strategic’. Therefore, even though Poland’s unilateral ban on Ukrainian agricultural products exemplified a conditional dissent strategy and no Europeanisation, it did not become a pattern to be considered an outcome of Europeanisation. Poland refrained from taking any steps that might undermine its broader support for Ukraine, with assisting the country and countering Russia remaining the highest policy priorities of both Polish governments. Hence, the Europeanisation of Poland’s foreign policy was not affected by occasional tensions in relations with Ukraine and resulted in minimal adaptation.

6.3. Summary

During the 2014–February 2022 period, Poland’s foreign policy towards Russia and Ukraine underwent modest changes due to the EU influence. Despite differing views on the EU, both governments in power adopted cooperative strategies, as the EU’s broader Eastern policy did not significantly conflict with their strategic policy objectives. PO’s EU-oriented foreign policy and PiS’s criticism of the EU and tense relations with Ukraine did not alter their shared views on Poland’s national policy goals. Except for a few instances, such as the June 2021 Council meeting, it was difficult for Poland to overcome the Franco-German dominance in the EU’s Eastern policy. Thus, both governments adopted strategic action to adapt their foreign policy positions to EU-level initiatives towards Russia and Ukraine. Strategic learning was limited because of Poland’s exclusion from the Normandy Format, the Franco-German influence on EU-level Russia and Ukraine initiatives and the PiS government’s Eurosceptical position, which hindered close foreign policy collaboration with the EU mainstream and Germany. Consequently, there were no EU-level pressures on Poland, and the Europeanisation of the country’s foreign policy happened through downloading, and to a lesser extent, cross-loading, resulting in the adaptation outcome during this period.

Between February 2022 and June 2024, Poland’s foreign policy experienced minimal changes due to the EU’s influence. As the Polish governments’ strategic policy objectives were largely concomitant with EU-level initiatives towards Russia and Ukraine, they mainly adopted cooperative strategies. However, Poland’s policy preferences were not fully reflected at the EU level, leading to moderation and changes in the country’s foreign policy position in instances

such as the EU's sanctions policy and the pace of granting Ukraine EU candidacy status. Europeanisation happened through cross-loading and downloading, as Poland changed its foreign policy by coordinating initiatives with fellow member states within the EU (cross-loading) and adapting to the EU line once these initiatives became the Union's common foreign policy (downloading). The main mechanism of Europeanisation was strategic action in both the cross-loading and downloading dimensions, while strategic learning remained limited due to Poland's already established and unyielding stance concerning EU-level Russia and Ukraine initiatives. Although Poland's opposition to the Solidarity Lanes and ATMs indicated a form of conditional dissent and no Europeanisation, it did not affect the country's broader alignment with the EU. Consequently, the EU's influence on Poland's foreign policy resulted in the minimal adaptation outcome of Europeanisation during this period.

Period	Poland's strategic policy objectives	EU-level initiatives	Strategies	Dimensions	Mechanisms	Outcomes
2014–February 2022	Russia: promote a more resolute EU common foreign policy towards Russia Ukraine: support Ukraine's sovereignty, territorial integrity and Euro-Atlantic ambitions, while managing bilateral historical issues	Russia: Weak EU diplomatic response (the Normandy Format and the Minsk agreements), inadequate sanctions regime and ineffective common energy policy Ukraine: EU diplomatic support for Ukraine's sovereignty and territorial integrity; V4 declarations; AA and DCFTA; the EUAM; support for Ukraine's energy independence	Cooperative	Downloading, cross-loading	Strategic action, limited strategic learning	Adaptation
2022–June 2024	Russia: achieve Russia's strategic defeat in Ukraine; promote tougher EU sanctions; eliminate the EU's energy dependence on Russia Ukraine: support Ukraine's sovereignty and defence through diplomatic, military, financial and humanitarian assistance; address historical issues before Ukraine's potential EU membership	Russia: Fourteen sanctions packages, including in the energy area; elimination of energy imports from Russia; diplomatic isolation of Russia Ukraine: EU candidate status and clear membership perspective; extensive military support (EPF, EUMAM, the Czech initiative, Ukraine Facility); financial (ATMs; MFA, Ukraine Facility) and humanitarian assistance (TPD)	Cooperative	Downloading, cross-loading	Strategic action, limited strategic learning	Minimal adaptation

TABLE 5. Europeanisation of Poland's foreign policy, 2014–2024

In sum, this chapter applied the Europeanisation framework developed in Chapter 2 to the Polish case, highlighting how EU-level initiatives interacted with the Polish governments' strategic objectives and influenced the mechanisms through which EU-level pressures translated into national foreign policy change. During the 2014–February 2022 period, when EU-level initiatives were relatively less ambitious and coherent, the Polish governments

maintained their cooperative strategies, which led to policy adjustments consistent with the adaptation outcome. After February 2022, although EU-level initiatives became more resolute, the substantial alignment between Poland's core strategic objectives and the EU's common position meant cooperative strategies remained dominant, leading to only minimal changes in the country's foreign policy. Overall, the case showcased that the scope and intensity of Europeanisation outcomes depend on the interaction between EU-level initiatives and a government's strategic objectives, which affect the mechanisms of Europeanisation and the extent of changes at the national level.

7. CONCLUSION

This chapter concludes the research on the Europeanisation of Hungary's and Poland's foreign policies. It begins by evaluating the Europeanisation framework by addressing the research questions presented in the introductory chapter based on empirical findings in Chapters 5 and 6. Section 7.2. outlines the thesis's contributions to the theoretical and empirical literature and identifies its potential limitations. Finally, Section 7.3. highlights potential directions for future research.

7.1. Evaluating the Europeanisation framework

This thesis has examined Europeanisation by considering the EU's common foreign policy following the 2014 Ukraine crisis as the least likely case of Europeanisation and investigating Hungary's and Poland's foreign policies towards Russia and Ukraine based on the maximum variation case selection strategy. It has resorted to process tracing, elite interviews and a large amount of secondary data to confirm the Europeanisation model and mechanisms presented in the second chapter. This has been achieved by addressing the main research question, which involved determining the Europeanisation of Hungary's and Poland's foreign policies, exploring the role of downloading and cross-loading dimensions and scrutinising the Europeanisation mechanisms.

Were Hungary's and Poland's foreign policies Europeanised during the Ukraine crisis between 2014 and June 2024, and if so, to what extent and through which mechanisms?

The empirical investigation has specifically focused on changes in policy substance rather than policy-making procedures and strategies to examine Europeanisation. It has been demonstrated that despite being a least likely case of Europeanisation, the EU's Eastern policy between 2014 and June 2024 led to changes in both Hungary's and Poland's foreign policies (see Table 2). In the context of recent crises and the evolving nature of the EU foreign policy cooperation, the findings have shown the EU's growing influence on member states' foreign policies. As such, they have significantly increased the concept's explanatory power by proving the EU's impact on the national level even in areas lacking advanced integration or consensus among member states. However, Europeanisation did not generate changes in the two countries' strategic policy objectives regarding Russia and Ukraine and was rather limited to changes in their national policy positions. Despite Europeanisation, the EU's role in the two countries' foreign policies was evidenced by different causal paths and generated varying outcomes. While the EU's differential impact on member states' national policies is a well-known phenomenon and not a novel contribution in itself, the study has revealed the connection between a government's interpretation of a country's strategic policy objectives and Europeanisation mechanisms in the causal chain of Europeanisation. Namely, it has confirmed that a member state government adopts a cooperative strategy as long as an EU-level initiative does not affect its strategic policy objectives, while it employs a conditional dissent strategy when such an initiative contradicts its strategic priorities. These strategies, in turn, determine the mechanisms of change in a member state's foreign policy.

In the case of Hungary, while the Orban government did not agree with some of the EU-level policy initiatives towards the crisis during the 2014–February 2022 period, it remained cooperative and did not consider them critical enough for its strategic policy objectives to adopt a conditional dissent strategy, which resulted in the fragmentation outcome of Europeanisation. However, as the EU's response to Russia's full-scale invasion was at odds with the Hungarian government's strategic policy objectives, Hungary's stance was characterised by a conditional dissent strategy during the February 2022–June 2024 period, producing the resistance outcome of Europeanisation. As for Poland, the respective Polish governments generally viewed the EU's Russia and Ukraine policies as compatible with their strategic objectives and were mainly cooperative towards them, which meant the EU's influence on Poland's foreign policy reflected adaptation between 2014 and June 2024.

The empirical findings have demonstrated that changes in the substance of a member state's foreign policy do not necessitate strict adherence to the EU's traditional norms and principles. While the Polish case reflected the case of Europeanisation without considerable friction between the national and EU levels, Hungarian foreign policy between February 2022 and June 2024 was marked by the government's consistent contestation of the EU's common foreign policy. It was accompanied by hard bargaining tactics, delays and veto threats, which went against the Union's traditional foreign policy norms and principles. However, Hungary was ultimately forced to alter its policy position towards the majority of the EU's Russia- and Ukraine-related initiatives. Although these changes did not translate into shifts in the country's strategic policy objectives, they signified that the non-conformity with the EU foreign policy norms and principles does not prevent Europeanisation.

Domestic factors have not been treated as separate independent variables, as the main research question focused on changes at the national level specifically due to the EU's role. Instead, certain domestic and pre-existing conditions (i.e., Hungary's and Poland's historical perceptions of Russia and Ukraine, the Hungarian and Polish governments' views of the broader EU project) have been scrutinised to ascertain the starting policy positions of the Hungarian and Polish governments before examining the EU's impact on the two countries. Put differently, the national level, as the dependent variable of this research, has been treated as a 'black box' by considering some domestic and pre-existing factors but without being subjected to a causal analysis as to how these factors might have shaped it.

Concerning Europeanisation dimensions, the evaluation of the Europeanisation of Hungary's and Poland's foreign policies has shown that both downloading and cross-loading dimensions contributed to changes in the two countries' national policies. Two interrelated factors have determined how these dimensions functioned: a member state's willingness to participate in the EU foreign policy-making and the driving force behind the EU's common foreign policy. Hungary was not actively involved in the EU-level diplomacy towards the crisis between 2014 and February 2022, and the government's diplomatic efforts between February 2022 and June 2024 were mainly directed at defending its strategic objectives rather than contributing to the EU's common foreign policy towards the war. The Hungarian government's unwillingness to engage with EU-level policy initiatives led by other member states and its largely defensive approach to the EU's policies excluded the cross-loading dimension of Europeanisation. Thus, changes in Hungarian foreign policy occurred through downloading between 2014 and June

2024, as the country altered its national policy positions after the EU's common foreign policy had been formulated. Although downloading during the 2014–February 2022 period was voluntary and without EU-level pressures, Hungary faced significant pushback from the EU and fellow member states to drop its opposition to the EU's Russia and Ukraine policies during the February 2022–June 2024 period due to its conditional dissent strategy.

As for Poland, the review of the country's foreign policy has displayed that, in addition to a member state's willingness to assume an active role in the EU foreign policy-making, the formulation of the EU's foreign policy also influences the dimension of Europeanisation. Namely, the dominance of the Franco-German leadership between 2014 and February 2022 meant that these two countries spearheaded the majority of the EU-level initiatives towards the crisis. Consequently, despite both Polish governments' aims to be more involved in the EU's common foreign policy, Poland's position in the EU foreign policy-making diminished after its early mediation efforts through the Weimar Triangle. It meant that Poland adapted to the Franco-German proposals after they were presented at the EU level, without a significant contribution of its own. Although there was an element of cross-loading in the Polish governments' engagements in the launch of the EUAM and supporting Ukraine in the military and security areas, France and Germany shaped the EU's foreign policy largely based on their strategic objectives between 2014 and February 2022, meaning that changes in Poland's foreign policy happened predominantly through downloading directly from the EU in a top-down fashion. However, the Franco-German influence over the EU's foreign policy was considerably weakened following February 2022, allowing Poland to have more say in the EU's Russia and Ukraine policies. While it is difficult to argue that Poland became the leader of the

EU, the country's central role in the Union's foreign policy-making led to enhanced coordination and consultations with other member states, generating limited changes Poland's foreign policy and demonstrating the presence of the cross-loading dimension. At the same time, Poland modified some of its foreign policy positions due to the EU's direct influence (but without any considerable pressures) by downloading from its broader common foreign policy towards the war between February 2022 and June 2024.

Regarding Europeanisation mechanisms, the empirical analysis has found that strategic action, strategic learning and hostage-taking were the mechanisms of change in the Europeanisation of Hungary's and Poland's foreign policies. These mechanisms directly depended on the respective governments' policy strategies towards the EU's Russia- and Ukraine-related initiatives, which reflected how they interpreted their states' strategic policy objectives. In Hungary, the Orban government's cooperative strategy between 2014 and February 2022 meant that the Europeanisation of the country's foreign policy happened through strategic action. Although the EU's common foreign policy towards Russia and Ukraine was not fully aligned with Hungary's policy priorities, the government did not consider them significant enough to mount a formal opposition to the EU. Thus, Hungary's strategic action included aligning with the EU's common line while also conducting its independent foreign policy, as the relatively loose nature of the EU's foreign policy allowed the country room for manoeuvre in maintaining this position. However, in the face of the EU's more resolute foreign policy towards Russia's full-scale invasion between February 2022 and June 2024, the Hungarian government resorted to conditional dissent, as its strategic policy objectives consistently clashed with EU-level proposals. As a result, the main mechanism of Europeanisation was

hostage-taking, with the government attempting to secure favourable deals from the EU to protect its strategic national objectives before formally paving the way for unanimous EU decisions. Hungary's hard bargaining through veto threats and delaying tactics differentiated its hostage-taking from issue linkage, which may also occur when a state adopts a cooperative strategy.

In the Polish case, the investigation has found that the Europeanisation of the country's foreign policy happened through strategic action and limited strategic learning between 2014 and June 2024. Throughout the period, both Polish governments adopted predominantly cooperative strategies, and there were no significant differences between their strategic objectives and the EU's foreign policy towards Russia and Ukraine. Therefore, changes (albeit limited) in Poland's foreign policy happened mainly through strategic action, which involved the Polish governments' adaptation to the EU's common line even when it did not entirely reflect their foreign policy preferences. While Poland's adaptation to the EU's relatively suboptimal policies in the early years following the 2014 crisis was related to the PO government's EU-oriented cooperative strategy and strategic learning from Germany's more cautious policy, the PiS government's Eurosceptical approach constrained changes through strategic learning. Further, and more importantly, the room for strategic learning in Polish foreign policy during the 2014–June 2024 period remained limited because of the EU's and Poland's closer policy positions towards Russia and Ukraine. Thus, even limited changes through the cross-loading dimension of Europeanisation were accompanied by strategic action to promote similar positions with fellow member states rather than learning from their different policies.

Taken together, the findings of this research may have broader implications regarding Europeanisation, EU foreign policy cooperation, the EU's future relations with Russia and Ukraine and the future European security architecture. From the Europeanisation perspective, collective efforts to address Hungary's vetoes and opposition to common foreign policy decisions have demonstrated that the EU and member states can resort to instruments beyond the CFSP to overcome such opposition. Admittedly, the EU has more leverage against politically and economically weaker member states, this leverage is greater when common decisions are blocked by a single member state, and the unprecedented unity against Russia's full-scale invasion of Ukraine may not translate into other common foreign policy decisions. However, the EU's pressure on Hungary through its multilevel governance structure is likely to pave the way for its more direct influence on member states in a largely intergovernmental foreign policy area. Concerning EU foreign policy cooperation, the findings indicate that when there is a broad consensus among member states, common decisions can be advanced even under the unanimity principle and in the face of opposition from some member states. Although calls for adopting the QMV in the CFSP are likely to continue (Baerbock et al., 2023; European Commission, 2025b), the EU's employment of both CFSP and non-CFSP instruments in responding to the Ukraine crisis (particularly Russia's full-scale invasion) can build a precedent for its response to future crises by mobilising rapid collective action. Therefore, the future of EU foreign policy cooperation may not solely depend on institutional reform but also on crisis-driven consensus and the EU's ability to combine formal procedures with flexible and pragmatic solutions.

In terms of the EU's relations with Russia and Ukraine, the developments post-February 2022 suggest a reorientation that is likely to remain the defining feature of its common foreign policy. Despite opposition from Hungary, the EU's relations with Russia are unlikely to be driven by economic logic again for the foreseeable future (unless there are significant changes in Russia's foreign policy), as member states such as France and Germany, who had adopted moderate positions pre-February 2022, have gradually shifted to a geopolitical and security-oriented policy objectives towards Russia. Regarding Ukraine, the EU's post-war policy will have to focus on state-building, reconstruction and enlargement. While there is a strong will among most member states and EU institutions concerning Ukraine's EU membership, the potential EU treaty reform before absorbing new member states, security guarantees to Ukraine and the uncertain size and population of the country remain crucial factors to be resolved. Finally, the findings have shown that the EU has taken significant steps towards becoming a geopolitical actor following Russia's full-scale invasion. However, amid discussions around the EU's strategic autonomy, the US pivot to Asia and the future European security architecture (see Anghel and Damen, 2025, pp.66-112 for an extensive overview), the EU still lacks capacity and hard power to establish itself as a serious security actor. This can be observed in EU member states' attempts to maintain the US engagement in Europe and to ensure its involvement in a potential postwar Coalition of the Willing to provide security guarantees to Ukraine (Tidey, 2025; Wintour, 2025). Therefore, unless EU member states significantly increase their defence-industrial capacities, military potential and ability to deploy substantial troop numbers without the US command-and-control support, the EU's role in the future European security architecture will remain heavily dependent on external factors such as continued US engagement in Europe and the outcome of Russia's war in Ukraine.

Period	EU-level initiatives	Country	Strategic policy objectives	Strategies	Dimensions	Mechanisms	Outcomes
2014–February 2022	Russia: Weak EU diplomatic response (the Normandy Format and the Minsk agreements), inadequate sanctions regime and ineffective common energy policy Ukraine: EU diplomatic support; V4 declarations; AA and DCFTA; the EUAM; support for Ukraine’s energy independence	Hungary	Russia: voice verbal opposition to EU sanctions; prioritise economy-driven foreign policy towards Russia Ukraine: protect the rights of the Hungarian minority	Cooperative	Downloading	Strategic action	Fragmentation
		Poland	Russia: promote a more resolute EU common foreign policy towards Russia Ukraine: support Ukraine’s sovereignty, territorial integrity and Euro-Atlantic ambitions, while managing bilateral historical issues	Cooperative	Downloading, cross-loading	Strategic action, limited strategic learning	Adaptation
February 2022–June 2024	Fourteen sanction packages, including in the energy area; elimination of energy imports from Russia diplomatic isolation of Russia EU candidate status and clear membership perspective; extensive military support (EPF, EUMAM, the Czech initiative, Ukraine Facility); financial (ATMs; MFA, Ukraine Facility) and humanitarian assistance (TPD)	Hungary	Russia: maintain bilateral ties; resist EU sanctions and energy decoupling from Russia; prioritise ceasefire and negotiations Ukraine: gain concessions from Ukraine regarding the minority rights; oppose the EU’s foreign policy towards the war and Ukraine (including Ukraine’s EU candidacy and financial support) to achieve concessions from the EU	Conditional dissent	Downloading	Hostage-taking	Resistance
		Poland	Russia: achieve Russia’s strategic defeat in Ukraine; promote tougher EU sanctions; eliminate the EU’s energy dependence on Russia Ukraine: support Ukraine’s sovereignty and defence through diplomatic, military, financial and humanitarian assistance; address historical issues before Ukraine’s potential EU membership	Cooperative	Downloading, cross-loading	Strategic action, limited strategic learning	Minimal adaptation

TABLE 6. Europeanisation of Hungary’s and Poland’s foreign policies, 2014–2024

7.2. Contributions and limitations of the research

This thesis makes both theoretical and empirical contribution to the literature. Theoretically, the thesis has developed a new model of the Europeanisation of foreign policy based on a rationalist understanding of state action. The investigation of Hungary's and Poland's foreign policies in the context of the EU's response to the 2014 Ukraine crisis and Russia's full-scale invasion of Ukraine has allowed us to confirm the Europeanisation of the two countries' foreign policies and the significance of an interest-based intervening variable in examining the concept. Namely, the two cases have proven that a government's interpretation of a country's strategic policy objectives determines a member state's strategy (cooperative or conditional dissent), which, in turn, informs the Europeanisation mechanisms (strategic learning, strategic action, issue linkage and hostage-taking) and leads to one of the five outcomes of policy change at the national level (transformation, adaptation, fragmentation, resistance and no Europeanisation). Moreover, the study has also helped identify the scope conditions of the Europeanisation mechanisms based on a member state's strategic choices, as the cooperative strategy towards an EU-level policy initiative has generated strategic learning and strategic action, while the conditional dissent strategy has prompted hostage-taking. While the existing literature has explored various ways in which the Europeanisation of a member state's foreign policy may happen, this research has presented a complete causal chain between the independent and the dependent variables by linking an EU-level policy initiative to changes at the national level.

Further, by arguing that a member state's strict adherence to the EU's traditional code of conduct in foreign policy is not a necessary condition for a change in the policy substance due to the EU influence, this study has specified two underexplored Europeanisation mechanisms, issue linkage and hostage-taking, for explaining change at the national level. It constitutes a novelty in this research, as the traditional literature has largely resorted to socialisation and learning to expound the Europeanisation of foreign policy and mainly overlooked instances where a member state may not be prepared to alter its foreign policy, which can generate pressures from the EU level. The consideration of hostage-taking has allowed us to encapsulate these situations in examining Europeanisation. In this sense, the Hungarian case between February 2022 and June 2024 has demonstrated that even if a country consistently contests the EU's common foreign policy and does not follow traditionally accepted EU foreign policy norms and principles, the Union's broader influence can, in fact, produce changes in its position (albeit not in overarching objectives in the Hungarian case). Relatedly, the Hungarian case has also shown that, contrary to the conventional wisdom in the Europeanisation literature, the EU, with its institutional structure and member states, can exert pressures on a member state persistently blocking a common agreement by using political and economic instruments despite the largely unanimous nature of the EU foreign policy decision-making. Although the two cases have demonstrated no evidence of issue linkage, it is premature to exclude it from the list of Europeanisation mechanisms, since member states may well bargain at the EU level without resorting to the aggressive negotiation tactics used by Hungary.

Additionally, the thesis has also provided empirical insights into the EU's, Hungary's and Poland's foreign policies towards Russia and Ukraine. Overall, the EU's reaction to the 2014

crisis and Russia's full-scale invasion revealed the gradually increasing role of a strategic approach in its external relations.⁹⁷ While the EU is unlikely to become a traditional foreign policy actor, the developments in foreign, security and defence areas, especially following February 2022, suggest that its common policies are likely to be driven more by strategic considerations than normative factors. The research has explained the EU's cautious reaction to the 2014 Ukraine crisis by the hesitance of the western member states in general, and the Franco-German partnership in particular, to depart from their years-long Russia-first policy, which was ultimately replaced by a more decisive strategic objective of prioritising Ukraine following February 2022. The empirical analysis has demonstrated the Franco-German dominance in the EU's Eastern policy between 2014 and February 2022, which significantly limited other member states' input and cross-loading dynamics. It has also shown the EU's more coordinated response to Russia's full-scale invasion, which considerably reduced France's and Germany's role and provided more opportunities for cross-loading.

Moreover, the thesis has contributed to the literature on Hungary's and Poland's foreign relations with Russia and Ukraine and their interactions with the EU's common foreign policy and other EU-level initiatives towards these countries. The research has separately identified the Polish and Hungarian governments' strategic policy objectives in relation to the EU, Russia and Ukraine. The empirical investigation has confirmed the two countries' significantly different policy positions towards EU-level Russia and Ukraine initiatives and has shown that the divergences between their strategic policy objectives constituted the main reason for their

⁹⁷ See the emphasis on principled pragmatism in the EU's Global Strategy (EEAS, 2016b) and statements by senior EU officials (Borrell, 2022a, 2022b; European Commission, 2019).

varying policy positions. As such, the Fidesz government in Hungary prioritised economic relations with Russia and the minority issue in Ukraine, whereas the PO and PiS governments in Poland were driven by security logic in their Eastern policies. This has also enabled us to explain why the Eurosceptical views of Fidesz and PiS did not translate into a similar foreign policy towards Russia and Ukraine in the EU context.

Despite its contributions, the thesis has some limitations. First, although the empirical chapters have demonstrated the EU's role in Hungary's and Poland's national foreign policies, potential alternative explanations, such as the impact of the US and NATO, have not been examined comprehensively or in a fully systematic manner. The interview data has predominantly reflected the perspectives of EU diplomats and national officials working primarily on EU matters, which has limited the breadth of evidence available for assessing non-EU factors. Moreover, because many EU member states are also NATO members, it remains possible that some degree of cross-loading in the Polish case might have arisen from institutional overlap or parallel influence from NATO rather than exclusively from EU-level dynamics. As a result, the thesis cannot conclusively rule out these alternative causal pathways. Future research, ideally employing a broader comparative design (rather than strictly focusing on the EU as an independent variable) and examining a wide range of independent variables, would be more systematically positioned to evaluate alternative explanations and determine their relative explanatory power.

Second, one could make only modest generalisations about the Europeanisation model adopted in this research due to the case selection guided by a maximum variation strategy.

This thesis has focused on Hungary and Poland, whose foreign policies towards Russia and Ukraine represented opposite ends of the spectrum. However, when a limited number of cases are selected, all diverse categories within the case may not be fully represented (see Seawright and Gerring, 2008, p.301). For instance, in comparison with Hungary and Poland, there might have been member states, such as France and Germany, with relatively moderate and pragmatic foreign policies towards EU-level Russia and Ukraine initiatives between 2014 and June 2024. Relatedly, as leading member states in formulating the EU's common foreign policy, France and Germany might have been driven by different considerations. Therefore, their strategies, mechanisms of policy change and Europeanisation outcomes might have been distinct from Hungary and Poland. Further, while the investigation of Hungary and Poland has enabled us to confirm both strategies (cooperative and conditional dissent) outlined in the Europeanisation model, certain mechanisms, such as issue linkage, and outcomes, such as transformation and no Europeanisation, were not found in the case of these two countries. Thus, without applying the Europeanisation model to moderate cases and confirming the full applicability of strategies, mechanisms and outcomes, it is challenging to make broader generalisations and ensure the external validity of this research. Further comparative large-N studies or individual single-case research focusing specifically on moderate countries' national policies may uncover the full spectrum and prompt revisions to the Europeanisation model presented in this study.

Third, the thesis has focused on the period between 2014 and June 2024, meaning that the developments such as Hungary's and Poland's EU Council presidencies and the Trump administration's new foreign policy towards the EU, Russia and Ukraine were not a part of the

empirical analysis. It is a potential limitation of the study, as events after June 2024 might have revealed data necessitating changes to the Europeanisation model. However, a quick glance at the EU's, Hungary's and Poland's foreign policy positions demonstrates no significant changes in their stances towards Russia and Ukraine. Namely, the EU rallied to affirm its support for Ukraine and initiated plans to bolster its security in the face of the US's potential abandonment of Europe (European Council, 2025a, 2025b). Concerning Hungary, PM Orban's peace mission to Moscow in defiance of the Union's common line during the Hungarian Council presidency, the country's attempts to take hostage the EU's Russia sanctions, support for President Trump's vague peace proposal and abstention from the EU's renewed commitment to Ukraine in March 2025 showed the country's continuing resistance to Europeanisation (see Dubois, 2025; Dunai, Tamma and Seddon, 2024; European Council, 2025b; Orban, 2025; Rettman, 2024). For its part, the PO government in Poland sustained its efforts to support Ukraine and help the EU improve its security in countering Russia through the Council presidency and close collaboration with the Weimar Triangle, the Nordic states and the Baltic States, which indicated Poland's persistent alignment with the EU's common line and limited Europeanisation (see Council of the EU, 2025a; German Federal Foreign Office, 2024; Lepiarz, 2024; Szumski, 2024). Hence, despite the absence of transformative changes in the EU's, Hungary's and Poland's foreign policy positions after June 2024, the subject matter remains a moving target. Future developments may therefore affect the longer-term relevance of the findings, constituting a minor limitation of this research.

7.3. Avenues for future research

The thesis's theoretical and empirical findings could open several promising areas for future research. Concerning the Europeanisation of foreign policy, the model in the thesis could be tested and refined through its application to other cases, which would also help establish its external validity. The foreign policies of France, and particularly Germany, could provide interesting test cases given their relatively moderate positions compared to Hungary and Poland and leading role (albeit not so dominant after February 2022) in formulating the EU's common response to the Ukraine crisis and Russia's full-scale invasion. Specifically, it would be interesting to examine the EU's influence on the two countries' foreign policies, strategies and Europeanisation mechanisms, considering that they were the main drivers of the EU's common foreign policy towards Russia and Ukraine between 2014 and February 2022. For instance, further research could explore whether the responsibility and expectations placed upon these two countries inevitably lead to their cooperative strategies and eliminate conditional dissent regardless of their governments' strategic policy objectives. Additionally, later studies could also investigate the foreign policies of non-frontline and geographically distant member states, such as Italy and Spain, to ensure the external validity of the model, given that their governments' strategic policy objectives and threat perceptions might have been rooted in different rationales. Moreover, further studies could examine the new Europeanisation mechanisms, issue linkage and hostage-taking, and their broader applicability to other cases. While this thesis has demonstrated Hungary's extensive usage of hostage-taking, the empirical record shows that other member states, such as Austria, Cyprus, France and Greece, have also resorted to vetoes, veto threats and delaying tactics to achieve their strategic policy objectives

regarding the EU's common foreign policy decisions (see Koenig, 2022; Wessel and Szep, 2022). In this context, prospective studies could help consolidate the role of hostage-taking among Europeanisation mechanisms.

Future research could also explore the increasing role of EU institutions in the areas of foreign policy, security and defence and its implications for policy changes at the national level. The empirical evidence in this research has shown the Commission's more prominent role in coordinating the sanctions policy and the EPF and the EU's institutional pressures on Hungary to overcome its resistance to common decisions following February 2022. Admittedly, it is highly unlikely that member states will cede national sovereignty to EU institutions in the CFSP area through a treaty change. However, plans such as the Readiness 2030 (also known as the ReArm Europe), aimed to boost defence spending (European Commission, 2025a), will likely to require some form of coordination and central planning. While there are differing views and proposals (see Wolff, Steinbach and Zettelmeyer (2025), who argue for the creation of the European Defence Mechanism (EDM), and Brogger (2025), who asserts that there is already a gradual shift towards supranationalism), the external developments and changing security environment will only facilitate the EU's common efforts (see Maurer, Raube and Whitman, 2024; Riddervold and Rieker, 2024). In this sense, it would be worth investigating how member states (especially the reluctant ones) react to potential EU-level pressures and how the EU's growing institutional involvement affects traditional views on the Europeanisation of foreign policy.

Finally, the thesis's empirical findings may offer insights into directions for new studies on populist foreign policy. This research has demonstrated that Fidesz in Hungary and PiS in Poland pursued comparatively different foreign policies towards the EU's common response to Russia's full-scale invasion of Ukraine despite their Eurosceptical and populist orientations. It has been shown that while there were similarities in their policy styles, strategic policy objectives rather than ideologies determined their foreign policy positions. In this sense, subsequent studies could provide a detailed understanding of the various determinants of populist foreign policy and the conditions under which they differ, particularly in the light of evidence from this study that populist parties do not always oppose the EU's common line.

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ANNEX 1: LIST OF INTERVIEWS

Interview 1	a former senior Polish diplomat	1 March 2024
Interview 2	a senior EU diplomat	13 March 2024
Interview 3	a former Polish diplomat	15 March 2024
Interview 4	a former PiS policy advisor	25 March 2024
Interview 5	an EU diplomat	27 March 2024
Interview 6	an EU diplomat	24 April 2024
Interview 7	a senior EU diplomat	26 April 2024
Interview 8	a former policy advisor to the Fidesz government	2 May 2024
Interview 9	a Hungarian policy expert	21 May 2024
Interview 10	a former senior Polish diplomat	23 May 2024
Interview 11	a senior EU diplomat	6 June 2024
Interview 12	a senior Hungarian diplomat	11 June 2024
Interview 13	a Hungarian foreign policy expert	21 June 2024
Interview 14	a former Hungarian diplomat	4 July 2024
Interview 15	a Polish policy expert	8 July 2024
Interview 16	a Hungarian policy expert	10 July 2024
Interview 17	a Polish foreign policy expert	29 July 2024
Interview 18	a former senior EU diplomat	1 August 2024
Interview 19	a former Hungarian diplomat	12 August 2024
Interview 20	a former Polish policy-maker	12 August 2024
Interview 21	a Polish foreign policy expert	16 August 2024
Interview 22	a former senior Hungarian diplomat	30 August 2024
Interview 23	a former senior Hungarian official	6 September 2024
Interview 24	a former Polish diplomat	26 September 2024
Interview 25	a Polish policy expert	11 October 2024

Interview 26	a former senior Polish diplomat	20 October 2024
Interview 27	a Polish policy expert	5 November 2024
Interview 28	a former senior Hungarian diplomat	29 November 2024
Interview 29	a former Polish diplomat	14 January 2025
Interview 30	a former senior Hungarian official	18 March 2025

ANNEX 2: INTERVIEW QUESTIONS⁹⁸

1. Could you briefly describe Hungary's/Poland's position within the EU towards Russia and Ukraine in the aftermath the 2014 Ukraine crisis?
2. What influence, if any, did the EU's common foreign policy have on Hungary's/Poland's foreign policy towards Russia and Ukraine?
3. What considerations shaped the Hungarian/Polish government's position within the EU and towards the crisis? What were the determinants of Hungary's/Poland's foreign policy towards Russia and Ukraine between 2014 and 2022?
4. What was the nature of the EU pressures on the Hungarian/Polish government at the time to follow the Union's common policy?
5. How were Germany's and France's efforts perceived in Hungary/Poland? Did they affect Hungary's/Poland's position towards Russia and Ukraine, and what was Hungary's/Poland's contribution to these policies?
6. Were there any intra-EU alternatives (to the Franco-German approach) proposed by Hungary/Poland regarding the EU's common Russia and Ukraine policies?
7. How did Hungary's/Poland's foreign policy develop after the Russian aggression started in 2022?
8. Did the Hungarian/Polish government modify the strategy or policy approach it adopted between 2014 and 2022?
9. What do you think explains different (and sometimes unrelated) justifications used by the Hungarian government to oppose Ukraine's EU accession process, financial aid to Ukraine and the release of the EPF reimbursements?
10. Did a specific country (or a group of countries) play a leading role in convincing the Hungarian government to change his stance and somehow modify Hungary's resistance to the EU policies?
11. Were there any differences between the two Polish governments' (PO and PiS) strategies and policy preferences regarding the EU's common Russia and Ukraine policies and overall EU policy-making between 2014 and 2022?
12. How was Poland's more assertive stance against Russia and support for Ukraine after 2022 perceived by the EU and other member states?

⁹⁸ As the interviews were semi-structured, the questions were not always asked in the exact form or order presented here, and the discussions were not limited to these questions.

13. How could you describe the EU's common Russia and Ukraine policies after Russia's annexation of Crimea and between 2014 and 2022?
14. How was the Franco-German-led Normandy Format perceived within the EU and among other member state capitals?
15. Could you compare the EU's collective responses to Russia's annexation of Crimea in 2014 and Russia's full-scale invasion in 2022?
16. How have the EU's policies evolved after Russia's full-scale invasion of Ukraine, and what key objectives have guided these developments?
17. Have the differences among member states' policy positions affected the effectiveness of the EU's common policy?
18. Could you elaborate on how the differences regarding sanctions and other common decisions have been overcome?
19. Could you describe the EU unity against the Russian invasion and how consensus was achieved to generate a coherent EU foreign policy after February 2022?
20. Could you elaborate on the EU decision-making processes and coordination between the EU institutions (the Commission, the EEAS) and member states before and after Russia's full-scale invasion?

ANNEX 3: ETHICS FORMS

Consent Form

Name and position of researcher: Orkhan Naghiyev, Postgraduate Research Student (School of Government, University of Birmingham).

Title of the Project: The European Union and its role in foreign and security policy change in Hungary and Poland since the 2014 Ukraine crisis⁹⁹

Fair Processing Statement: This information is collected as part of a PhD project that investigates the impact of the European Union's (EU) common foreign and security policy on Hungary's and Poland's national policies since the 2014 Ukraine crisis. The information which you supply and that may be collected as part of the research project will be entered into a filing system or database and will only be accessed by authorised personnel (I and my supervisors) involved in the project. The information will be retained at the University of Birmingham secure archives for a minimum period of ten years and will only be used for research and statistical and audit purposes. By supplying this information, you are consenting to the University storing your information for the purposes stated above. The information will be processed by the University of Birmingham in accordance with the provisions of the Data Protection Act 2018. No identifiable personal data will be published.

1. I confirm that I have read and understood the participant information leaflet for this study. I have had the opportunity to ask questions if necessary and have had these answered satisfactorily. (Yes/No)

2. I understand that my participation is voluntary and that I am free to withdraw at any time without giving any reason before the data analysis process has started. If I withdraw my data will be removed from the study. (Yes/No)

3. I understand that my personal data will be processed for the purposes detailed above, in accordance with the Data Protection Act 2018. (Yes/No)

4. I agree to the use of anonymised quotes in publications. (Yes/No)

5. I agree to the use of audio recording during the interview. (Yes/No)

*** (Yes/No) please delete as appropriate by keeping only one.**

Based upon the above, I agree to take part in this study.

Name of participant

Date

Signature

⁹⁹ The final title had not been agreed upon at the time of the interviews, and a less-theory-laden formulation was deliberately chosen to facilitate engagement with interviewees.

Orkhan Naghiyev
Name of researcher

Date

Signature

Participant Information Sheet

Title of the Project: The European Union and its role in foreign and security policy change in Hungary and Poland since the 2014 Ukraine crisis

Dear Mr/Ms,

You have been invited to take part in the research study. This research is conducted by a Postgraduate Research student at the University of Birmingham, Orkhan Naghiyev. The study is part of a PhD programme in Political Science and International Studies and will lead me to gain a doctorate from the University of Birmingham. It is part of the University's ethics guidelines that participants must know why the research is being done and what it will involve. Please take time to read the following information. If you have any questions, please feel free to ask me.

Purpose of the research

This research aims to understand the impact of the EU on Hungary's and Poland's national foreign policies since the 2014 Ukraine crisis. A particular focus is on the EU's relations with Russia and Ukraine and how the EU's approach to these policies has influenced Hungary's and Poland's foreign policies since 2014.

Your involvement in the research

As a participant, you have been chosen because of your deep and valuable professional expertise at ... In particular, your experience at ... is unmatched for helping me conduct this research. Your involvement will consist of answering open-ended questions, and I am flexible in accommodating your schedule regarding the duration of the interview. The questions (please see attached to the email) will cover the EU's policy towards Russia and Ukraine since the 2014 Ukraine crisis (in the case of Hungary and Poland, their foreign policies towards Russia and Ukraine since the 2014 crisis). The interview may be recorded (please see the consent form) using a voice recorder. However, I must emphasise that your involvement in the research is entirely voluntary. If you decide to take part, you are still free to withdraw at any time without giving a reason before the data analysis process (1 July 2024) has started. If you choose to do so, you may also withdraw any data you have supplied which has not been processed or analysed.

Risks and benefits of taking part

There are no obvious risks in taking part. By taking part, you will be helping me contribute to the emergent literature on the Ukraine crisis and the impact of the EU's foreign and security policy decisions on member states' foreign policies.

Confidentiality of what you tell

As a researcher, I will ensure that individuals' names will be removed from any data after it has been collected and replaced with a code. If at any time you would wish any of your responses not to be included in the research, please note this, and I will respect these requests fully. Subsequently, I will ensure that the data collected from you is stored at the University of Birmingham's highly secure servers. Only I and my supervisors will have access to the collected data. It will be kept for a minimum period of ten years as per the University policies. Anonymity and confidentiality of the data you provide will be maintained. When data are used, I will once again ensure anonymity and privacy within the limitations outlined above through the reporting of the findings.

Findings of the research

The findings of this research will be part of the PhD project and may be used for conference papers and journal articles.

Any concerns

If you have any concerns about this research, please feel free to contact Postgraduate Research student Orkhan Naghiyev by using one or more of the means below.

Alternatively, if you have any concerns about the conduct of this research, please feel free to contact the Lead Supervisor, Professor Graham Timmins, by one of the following means:

[REDACTED], [REDACTED].

Thank you for taking the time to read this information sheet and your interest in this research.

Researcher and contact details

Orkhan Naghiyev, Postgraduate Research Student (School of Government, University of Birmingham)

Email: [REDACTED]