

THE IMPACT OF RULING PARTIES' IDEOLOGY
ON DEFENSE EXPENDITURES OF EU MEMBER NATO COUNTRIES

BY

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DISSERTATION

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Abstract

NATO's enlargement didn't quell debates around pivotal issues within the alliance, particularly concerning defense spending among its members. In the post-Cold War era, the disappearance of an overt Soviet menace led to a notable reduction in defense budgets across NATO countries. This era also underscored the burgeoning issue of burden sharing within the alliance. Despite not all members reaching the 2% GDP target, there's been a significant increase in the number of states enhancing their defense budgets, particularly in response to the ongoing conflict in Ukraine.

What underlies the variation in defense spending among a group of NATO allies in response to a crisis at the heart of Europe—a crisis that affects all members? Partisan politics theory posits that there is a “linear and direct linkage” between the type of governing political party (social-democratic or conservative) and policy outcome. The findings in this study show that the right governments in democracies are more associated with the more spending on defense.

Dedication

To my mother

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Pursuing a master's degree abroad with your two daughters is not easy and working with a quantitative method can make this study even more difficult. First of all, I would like to thank my advisor Seden Akcinaroglu for her endless support. Without her, I would not have been able to write this thesis.

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List of Abbreviations

EU European Union

FSU Former Soviet Union Members

GDP Gross Domestic Product

GNI Gross National Income

IO International Organization

IR International Relations

RILE The Left-Right scale

MARPOR Manifesto Research on Political Representation

MID Militarized interstate disputes

NATO North Atlantic Treaty Organization

UN The United Nations

US The United States of America

Introduction

Luxembourg has, in an unprecedented effort, subscribed to the Vilnius commitment in terms of defense, setting 2% as a baseline and aiming to reach, in time, the 2% of its GNI.” The Deputy Prime Minister and Minister of Defence, François Bausch (Chronicle Luxembourg 2023).

“Two percent was good 10 years ago. Now 3% is required in response for the full-scale war launched by Russia right beyond NATO’s eastern border.” The President of Poland, Andrzej Duda (Gera, Madhani, and Scislowska 2024).

The establishment of a minimum defense spending threshold of 2% of GDP by NATO members was a decision made in 2014, in the aftermath of Russia's annexation of Crimea. Currently, the continent of Europe faces the biggest war after World War II and the war in Ukraine accelerated the trend which can be seen in the report. NATO’s latest report related to defense spending of allies in 2023 demonstrates that even though there is an increasing trend in defense spending of allies since 2014 the threshold was not met by every member of NATO. On one hand, Luxembourg requests a calibration to the defense spending commitment (2%) according to Gross National Income (GNI) instead of Gross National Product (GDP) since the country is so rich but so small, (Pugnet 2023). On the

other hand, Poland calls on other allies to raise their defense spending to at least 3% of their GDP instead of 2% of their GDP, which is the current criterion (FOX News 2024). Poland advocates that the criterion of at least 2% of GDP defense spending was good enough in 2014 but not now because of the war launched by Russia (Gera, Madhani, and Scislowska 2024). What underlies the variation in defense spending among a group of NATO allies in response to a crisis at the heart of Europe—a crisis that affects all members? This question forms a compelling puzzle that merits detailed research. I posit that this puzzle can be understood by considering the role of political parties. I argue that parties still matter significantly and are central to understanding the decision-making mechanisms.

James Madison, one of the founding fathers and the fourth president of the U.S., pointed out in 1792 that “in every political society, parties are unavoidable”¹. Political parties are complex institutions. They are complex because it is not easy to understand or evaluate them (Eldersveld 1982, 407). They are institutions because they have some durability (Aldrich 2019, 359). Political parties undoubtedly lie at the heart of democracy. They are indispensable institutions of political life in democratic countries because of their functions. Political parties perform mainly four functions: to connect society and state; to conduct of electoral competition; the recruitment of personnel for elective and appointive office and to represent citizens (Katz 2020, 217–18).

¹ James Madison, *Parties* (the National Gazette, [ca. 23 January] 1792), <https://founders.archives.gov/documents/Madison/01-14-02-0176>

The distinguishing mechanism of democracy is elections since elections translate voter preferences into collective choices (McDonald and Budge 2005, 3). Political parties mainly aim at winning elections to capture both elective and appointive offices in any branch of government (Downs 1957, 34). To this end, political parties develop and propose policies to solve the problems arising from the social, economic, and political life in the country. Hence, political parties are among the key actors in the political process.

In this regard, political parties play a significant role not only in shaping the views of individuals, but also in constructing government policy towards a specific issue. These policy suggestions should be proper to their set of ideas they emphasize in their party documents (party manifests) and reflexive to electorates' demands simultaneously because they compete in elections to gather electorates' support. According to the doctrine of party mandate, if a political party (or parties) forms the government, it will carry through the policies it promised during the election campaign because of concerns of being punished in the following election (Budge and Hofferbert 1990, 111). In sum, the fear of punishment brings together party policy commitment.

The enduring nature of ideological commitments within political parties offers a lens through which policy choices, including defense spending, can be understood. Conventional wisdom suggests that in the face of a security crisis or systemic threat, such as an external military aggression, there should be a significant convergence in policy decisions among nations, driven by the imperative to respond to the immediate danger.

This notion posits that external threats tend to diminish domestic political differences, fostering a unified approach to defense and security. Despite this, my research contends that the ideological positions of parties continue to play a critical role in shaping policy, even in the context of such converging forces. By contrasting the impact of partisanship with theories like realism, liberalism, and diversionary war theory, I show that parties still matter. This dissertation employs a quantitative methodology to analyze defense spending trends among EU member states within NATO following Russia's invasion of Ukraine to understand the extent to which ideological predispositions of governing parties affect partisan discussions and policy decisions regarding defense spending. This research endeavors to enrich the discourse on how domestic political dynamics intersect with foreign policy decisions, challenging the prevailing notion that partisanship diminishes in importance in the face of systemic pressures.

The first chapter presents the literature review focusing on defense spending and the influence of partisan politics, highlighting key debates and theoretical perspectives. In the second chapter, I explore the historical and political landscape shaped by NATO's enlargement and Russia's aggression against Ukraine. The third chapter focuses on partisan politics theory as the primary framework for understanding the observed variations in defense spending, while also considering alternative explanations such as external threat perception, diversionary war, realism, and liberalism. The fourth chapter presents the research design, empirical analysis, the results derived from the study and discusses further

robustness tests. Finally, in concluding chapter, I present my findings and discuss policy implications.

CHAPTER 1: Literature Review

Ideology links political parties' positions on policy issues (Fordham 1998, 392). Since left and right-wing political parties have diverging ideologies they have different policy priorities (Palmer, London, and Regan 2004, 2). Partisanship theory is a well-documented area within political science, backed by a significant amount of research. This review begins by exploring domestic outcomes, specifically how the ideological orientations of governing bodies affect various internal policies and socio-economic factors. It then broadens to examine the connection between partisanship and a wide range of foreign policy choices. Lastly, the focus narrows to the impact of political party ideology on defense spending, a topic of particular relevance to this study.

1.1. Partisanship Theory and Domestic Politics

Partisanship theory in domestic policy illustrates a fundamental division between left and right on socio-economic issues. The division is primarily based on the role of the state in the economy and social welfare. Leftist parties, characterized by their “inclusive and egalitarian” approach, advocate for a substantial role of the state in economic matters. This perspective is manifested in their opposition to the privatization of state-owned enterprises (Engler and Zohnhofer 2019, 1633), and their support for subsidies. Furthermore, leftist governments show a preference for public pensions, emphasizing a collective approach to social welfare (Kweon and Suzuki 2022, 264). Conversely, rightist parties champion the power of the free market and argue for a minimal state intervention in economic affairs. This ideology supports privatization and the reduction of subsidies, reflecting a belief in the efficiency of market forces (Blais, Blake, and Dion 1993, 43).

Consistent with their economic philosophy, rightist parties in power tend to favor private pensions, aligning with their preference for individual responsibility in social welfare (Kweon and Suzuki 2022, 264). Partisan differences in the macroeconomic sphere also refer to a trade-off between unemployment and inflation. One of the most significant studies in this field examines governments in twelve Western countries and claims that leftist governments prefer low unemployment versus high rates of inflation, but rightist governments choose low inflation versus high unemployment (Hibbs 1977, 1467–68)

1.2. Partisanship Theory and Foreign Policy

Even though the literature regarding the impact of ideology on domestic policy preferences of political parties is vast, the scholarship concerning party politics on foreign and security policy is scant except the case in the United States (Raunio and Wagner 2020, 515–16). When it comes to systematic empirical studies on foreign and security policy preferences of political parties, scarcity seems clearer (Haesebrouck and Mello 2020, 565). When Therien and Moel portrayed the state of art in the literature in the beginning of 2000s concerning domestic sources of foreign policy, they emphasized inadequate references to collective political actors, namely political parties (Thérien and Noel 2000, 152). Studies generally dealt with various nongovernmental actors, such as interest groups, multinational corporations, and the media, but little attention has been paid to political parties (Gerner 1995, 21).

The reason of this neglect is that foreign policy analysis scholars pay little attention to political parties because they emphasize the role of changes in the international system when they explain national foreign policies (Raunio and Wagner 2020, 516–20). Hence, Alden and Aren call political parties as “the neglected element” in the process of foreign

policy decision making (Alden and Aran 2017, 80). This neglect is confounder when considering the centrality of political parties in the government of liberal democracies, their importance in the study of public policy, and their acknowledged role in some key foreign policy issues and changes (Blais, Blake, and Dion 1993, 40). There is a clear link between partisanship in public opinion. For instance, cues coming from political elites (Berinsky 2009, 62; Zaller 1992, 200) related to various foreign policy matters such as the use of force or nuclear weapons have led to a result of public opinion divergence along party lines in American politics (Myrick 2021, 924). Another example is from Zaller's influential study, which shows the role of partisan cues, namely the information supplied by their own political party's candidate, in shaping the view of not just the most politically attentive group but also the entire mass public in the case of contested elections (Zaller 1992, 275).

Today's picture of literature shows significant progress that has been made in literature (Hofmann and Martill 2021, 305–6). Yet, much of existing scholarship and of the empirical studies examine use of force or conflict involvement or military deployment (Baum and Potter 2015, 18; Clark, Fordham, and Nordstrom 2016, 791; Heffington 2018, 65; Palmer, London, and Regan 2004, 2; Raunio and Wagner 2020, 521). On the other hand, few of the extant studies examine other policy choices. For instance, Fordham examines the effect of conflicting economic interests, party and ideology on U.S. foreign policy during the early Cold War era (Fordham 1998, 359). Greene and Licht examine the role of party preferences in foreign aid allocation (Greene and Licht 2018, 284).

As McDonald and Budge put forward that policies not backed up by money are probably ineffective (McDonald and Budge 2005, 142). For this reason, defense spending is an important indicator for actual policy. Few studies examine defense spending in

literature (Raunio and Wagner 2020, 521). There are many factors affecting defense spending of countries, which range from external threat to macroeconomic indicators, and political actors. Though there wide range of studies on the cause of defense sending ranging from the impact of military veterans, democratization to religious attitudes on (Blum 2021, 183; Fordham 2001; Roy 2019, 301), the majority of existing studies in the literature examine the linkage between external threats and defense spending (Aizenman and Glick, 2006; Haunstein, Smith, and Souva, 2021; Lektzian and Prins, 2008), as well as the relationship between economic conditions and defense spending (Heo, 2010; Keman, 1982).

Lastly, relevant to this study is the linkage between partisanship and defense spending (Budge and Hofferbert 1990, 112). Partisan preferences introduce a trade-off between civilian and military expenditure (Fordham 2007, 625–26), often depicted as the “butter versus guns” dilemma in political science literature, emphasizing the prioritization between public goods and security needs (Bove, Efthyvoulou, and Navas 2017, 582). Leftist parties are supportive of government spending and demand-side policies (Blais, Blake, and Dion 1993, 43). Rightist parties advocate defense expenditures (Raunio and Wagner 2020, 518). Budge and Hofferbert examine the linkage between U.S party programs and federal government expenditures (Budge and Hofferbert 1990, 116). Fordham’s study examines differentiation of preferences of the Democratic and Republican Parties regarding military spending in the United States during the Cold War and finds a statistically significant result for partisan differences over defense spending (Fordham 2002, 63–64). Foreign aid and defense spending are used as indicators for international affairs policy (McDonald and Budge 2005, 231). McDonald and Budge

examine foreign aid as ratio of defense spending across countries (McDonald and Budge 2005, 224). One of the most significant studies about defense spending examines whether the Republican Party and the Democratic Party change their positions on defense spending in time (Clark, Fordham, and Nordstrom 2016, 791). Clark et al. present the argument that until the latter half of the 1960s, Democrats maintained a more hawkish stance on foreign policy compared to Republicans, a position that shifted thereafter (Clark, Fordham, and Nordstrom 2016, 791–92). There are also studies that challenge the role of partisanship. Bendix and Jeong (2022) bridge the gap between individual ideologies and legislative behavior, revealing through their investigation that the ideological leanings of Congress members serve as a more significant predictor than party affiliation for their support of defense and foreign aid spending bills, highlighting a pivotal insight into the complexities of policy sponsorship.

Despite the existence of these studies, our understanding of when party ideologies matter remains limited, primarily because most existing research focuses on the US context. Furthermore, the global context has evolved. With the end of the Cold War, one might have anticipated an era of peace that would diminish the need for increased defense spending in favor of prioritizing other types of expenditures. However, new emerging threats, such as immigration issues and Russian aggression, necessitate a reassessment of the role of political parties in this contemporary era. The Ukrainian-Russian crisis serves as a pivotal natural experiment for examining and testing theories of partisanship, particularly as it offers a comparative perspective that extends beyond the traditional U.S. setting. This geopolitical conflict provides a unique opportunity to explore how partisan alignments and ideologies influence foreign policy responses across different nations. By

analyzing how countries with varying political landscapes and party systems react to the crisis, we can gain insights on the working mechanisms on partisanship theory that is generalizable to different contexts and crises globally.

CHAPTER 2: A New Cold War? NATO's

Enlargement and Russia's War against

Ukraine

2.1. NATO Foundation and Expansion: The Guarantor of Freedom or the Creator of the Crisis in Ukraine?

NATO frequently emerges as a key actor in discussions about the conflict in Ukraine, with Russia citing the alliance's expansion into Central and Eastern Europe as a primary cause of the war. To fully grasp this debate, it's essential to delve into NATO's historical evolution and assess its potential impact on the conflict. NATO is a collective-security organization established in 1949 after the second World War in the bipolar world to counter the Union of Soviet Socialist Republics (shortly the Soviet Union) and communist states. NATO is not only a military alliance but a community for the member countries that share the Western values namely democracy, rule of law and free market economy. These attributes of NATO mean that the organization adopts both national dynamics because of mutual defense commitment² and system-wide dynamics because of common norms (Sperling and Webber 2016, 26).

² Article 5 of the North Atlantic Treaty provides that the Parties agree that an armed attack against one or more of them in Europe or North America shall be considered an attack against them all.

NATO's strategy during the Cold War can be succinctly described with a threefold aim: to deter Soviet expansion into Western Europe, ensure continued American engagement in European security, and cautiously expand its membership to include new nations that aligned with these strategic objectives (Sayle 2023, 61). Within this strategic framework, NATO underwent three significant expansions during the Cold War: the inclusion of Greece and Turkey in 1952, the Federal Republic of Germany in 1955, and Spain in 1982. These expansions were not merely territorial; they were strategic moves designed to enhance the alliance's deterrent capability and ensure a balance of power in Europe. Throughout the Cold War era, NATO primarily served as a deterrent force, aiming to maintain stability across Europe and prevent any escalation into full-scale conflict between the Eastern and Western blocs (Sayle 2023, 59–62). This role underscored NATO's commitment to collective defense and the maintenance of peace and security on the continent.

In response to NATO's expanding influence, the Soviet Union orchestrated the creation of the Warsaw Pact through the Treaty of Friendship, Cooperation, and Mutual Assistance in May 1955. This move was directly prompted by the integration of the Federal Republic of Germany (West Germany) into NATO earlier that same year—a development that heightened the Soviet Union's sense of encirclement and the need for a counterbalance (NATO n.d.; Sayle 2023, 56). Like NATO, the Warsaw Pact was a collective defense agreement, designed to provide a mutual security framework for the Eastern Bloc countries. The Berlin Wall's fall in November 1989 marked a pivotal moment, symbolizing the imminent reunification of Germany and the beginning of the end for the Cold War's rigid bipolar structure. The Warsaw Pact dissolved in February 1991, a significant event

that preceded the disintegration of the Soviet Union in December 1991. These sequential events underscored NATO's endurance and strategic success, leading to the conclusion of the Cold War era.

The end of the Cold War led to debates in the 1990s about whether NATO should continue and, if so, what its role would be in the post-Cold War era. The United States of America preferred to preserve NATO in the post-Cold War security architecture and to enlarge the organization into Central and Eastern Europe (Goldgeier and Shiffrinson 2023, 3–5). Article 10 of the Washington Treaty enables “open door policy” for admitting “any European State” (NATO 2023). Not surprisingly, the borders of Europe are not defined in the treaty, which makes the organization flexible in the sense of determining a country as a European state. The decision of enlargement in the aftermath of the Cold War resulted in debates. The proponents of NATO enlargement claimed that the enlargement not only would assisted the expansion of democracy and free market economy in Europe but also integrated the US-led liberal order (Goldgeier and Shiffrinson 2023, 1). On the other hand, opponents advocated that enlargement would infuriate Russia and compel NATO to protect Central and Eastern Europe countries of having disputable strategic importance (Goldgeier and Shiffrinson 2023, 2).

NATO experienced ten rounds of enlargement, which increased the number of member states from 12 to 32 since 1949 to 2024 (NATO 2024). Six of ten rounds were finalized in the post-Cold war era (1999, 2004, 2009, 2017, 2020, 2023, 2024) and 16 states were admitted as new members, which doubled the number of memberships (from 16 to 32). Most of these states are former members of Warsaw Pact, namely Albania, Bulgaria,

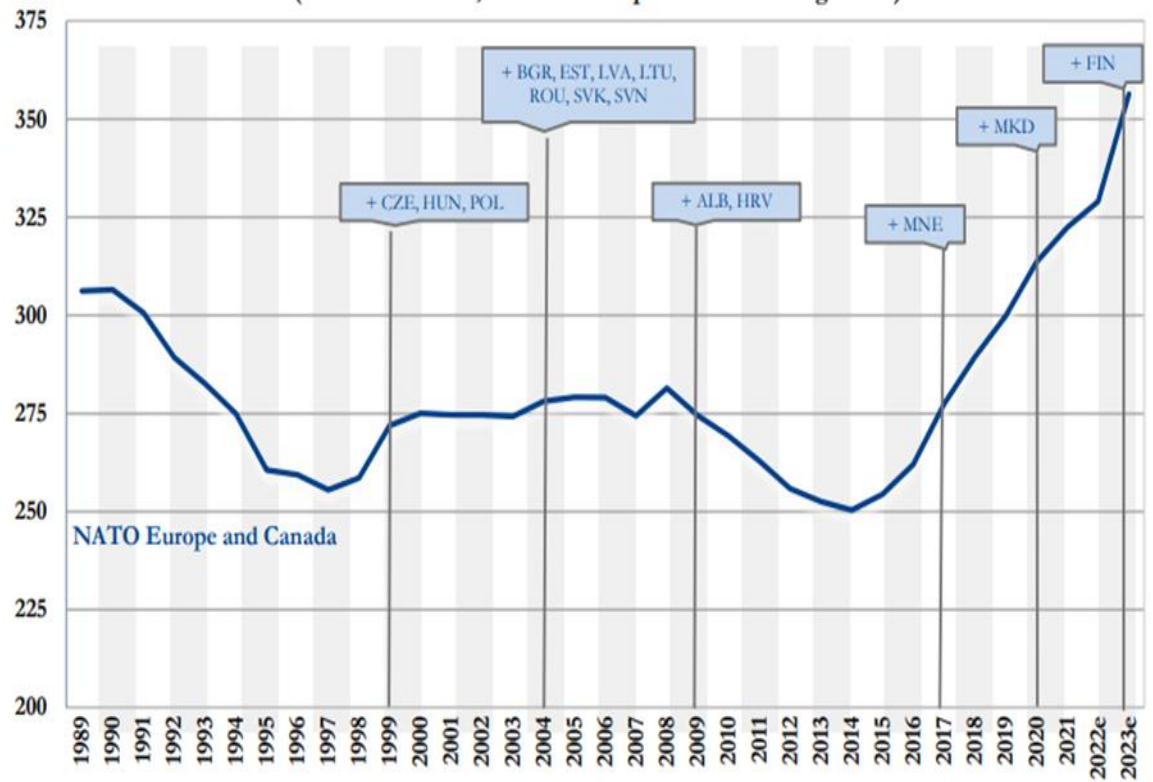
Czechoslovakia (currently Czechia and Slovakia), Hungary, Estonia, Latvia, Lithuania, Poland and Romania. Additionally, most of these new NATO members also became European Union members. In this way, these states are integrated into Western political and economic structure.

NATO's expansion didn't quell debates around pivotal issues within the alliance, particularly concerning defense spending among its members. The post-Cold War, the disappearance of an overt Soviet menace led to a notable reduction in defense budgets across NATO countries. This downturn mirrored the era's ethos, highlighted by initiatives like the 1997 NATO-Russia Founding Act and the 2002 Rome Declaration, which fostered forums for dialogue and cooperation between NATO and Russia. As a result, the average defense expenditure for NATO members, which stood above 3% of GDP during the Cold War, dwindled to below 2% in the subsequent period. This era also underscored the burgeoning issue of burden sharing within the alliance. The United States, under the Obama administration, voiced concerns about the unequal distribution of defense responsibilities among NATO members. However, it was President Trump who spotlighted the issue more prominently, even suggesting that the U.S. might undertake its defense obligations independently if the disparities weren't addressed. This rhetoric served not just as a critique of the existing fiscal contributions by member states but also signaled a potential shift in the U.S.'s strategic commitments to NATO under his presidency. On the other hand, even the existence of NATO was questioned once due to a statement made by the French President Emmanuel Macron in 2019, who said that NATO was experiencing "brain death" because of the U.S. failure in leadership and strategic coordination (Erlanger 2019). The

Russian invasion of Ukraine in 2022, however, seems to end these political debates related to “the brain death” in the North Atlantic Alliance.

The conflict between authoritarian and democratic states significantly impacts NATO’s strategic direction and the defense efforts of EU member countries within the alliance. This influence was notably evident when NATO announced an end to the trend of decreasing defense budgets in September 2014, coinciding with Russia’s annexation of Crimea in March 2014. This event underscored the reliance of European allies on the United States for protection and support within NATO since the Cold War era. Persuading European allies to increase their defense spending to the 2% GDP benchmark has been challenging for the US. However, the annexation of Crimea served as a pivotal moment, reversing the declining trend in defense expenditures. Data released by NATO in July 2023 indicates a noticeable uptick in defense spending since 2014, marking a departure from previous years. Despite not all members reaching the 2% GDP target, there’s been a significant increase in the number of states enhancing their defense budgets, particularly in response to the ongoing conflict in Ukraine. The sharp rise in defense spending over the last two years, as illustrated by the steep slope in the referenced graph, underscores the central role of the Ukraine conflict not only in discussions about NATO’s expansion but also in the broader debate concerning member contributions to collective defense efforts through increased defense spending. Analyzing the causes and implications of the Ukraine war is crucial for understanding both current and future developments within NATO’s framework.

Figure 1: NATO Europe and Canada - defense expenditure (billion US dollars, based on 2015 prices and exchange rates)



Source: https://www.nato.int/nato_static_fl2014/assets/pdf/2023/7/pdf/230707-def-exp-2023-en.pdf

2.2. The Biggest International Crisis in Europe after World War II: The War between Russia and Ukraine

On 24 February 2022, Russia initiated military actions in Ukraine, referring to them as “a special military operation” rather than using the term “war.” This choice of terminology is not arbitrary; following the adoption of the UN Charter, states have generally avoided the term “war” to sidestep the obligations imposed by the UN Charter and other international agreements, including the Geneva Conventions and their Additional Protocols. The distinction between “war” and “military operation” is significant, with the latter often implying an internal matter rather than a state-to-state conflict. Beyond the nuances of international law, the situation in Ukraine represents the most significant crisis in Europe since World War II, marking a critical moment in contemporary international relations. There are three reasons suggested for the decision of the Russian President, Vladimir Putin to launch these strikes against Ukraine (Kizilova and Norris 2023, 1). The first reason alleged for the Ukraine war is that President Putin follows a policy to revive the Soviet Empire. According to this interpretation, President Putin strives to expanding Russia’s border because of his desire to revive the Soviet Empire (Mearsheimer 2014, 85). It is noteworthy here that Ukraine is the largest country of the former Soviet republics in terms of territory (Gibler and Sewell 2006, 419).

In July 2021, President Vladimir Putin authored an article titled “On the Historical Unity of Russians and Ukrainians,” which was published on the Kremlin’s official website. In this piece, Putin posited that Russians and Ukrainians constitute a single people, sharing a deep historical and cultural bond that transcends modern political boundaries.

Furthermore, President Putin also labeled the current Ukrainian leadership as neo-Nazis and argued that Ukraine's "true" sovereignty is unattainable without a partnership with Russia. This rhetoric is reflective of Putin's broader strategic narrative, positioning Ukraine's government as illegitimate and hostile towards Russia, and suggesting that Ukraine's fate is inextricably linked to Russia. These assertions exemplify Putin's broader ambition to revive the influence of the Soviet Union (Kizilova and Norris 2023, 2)

The second reason suggested is that Russia is responding to NATO threat in its "near abroad". This reason evokes realist theory which claims great power politics and balance of power shape international relations. Russia has consistently framed NATO's eastward expansion as a direct security threat, viewing the alliance's approach to its borders as an encroachment on its sphere of influence and a challenge to its strategic interests (Goldgeier and Shiffrinson 2023, 8). Given this context, Russia's assertive actions have been somewhat anticipated. The war launched by Russia against Georgia in 2008 can be seen as an initial response for the enlargement of NATO. Furthermore, the annexation of Crimea in 2014 can be viewed as an extension of the strategy Russia employed in Georgia. Yet, it is noteworthy here that in any case, according to existing rules of international law, every sovereign state has the right to determine its policies and expect non-interference in internal affairs.

The third reason put forward related to the war is that President Putin desires to reverse his declining popularity by using the effect of rally round the flag on internal politics (Kizilova and Norris 2023). This reason evokes diversionary theory as an alternative explanation. Heads of State and/or Government can use international crises to

unite their citizens around them and to suppress opposition. In this regard, Kizilova and Norris claim that President Putin may have decided to launch war against Ukraine in order to reproduce the Crimean annexation effect on his popular support that lasted approximately 4.5 years (Kizilova and Norris 2023, 7–8). Kizilova and Norris use the Levada Center’s surveys related to Putin’s presidential approval to support their claim, which show 20% increase from 63% (one of the lowest percentage during Putin’s presidential term) to 83% (Kizilova and Norris 2023, 8). In addition, as a sample for suppressing opposition, Russia, on 4 March 2022, enacted laws allowing authorities to charge people due to false information and discrediting Russian army. Furthermore, Russia recently adopted a law allowing the state to confiscate properties due to discrediting of army (Associated Press 2024). In autocratic states like Russia, it is difficult to clearly determine the declining popularity of leaders or the public opinion about war because of fear citizens have.

The conflict initiated by Russia against Ukraine has not only destabilized NATO member states with direct borders with Russia but has also had a far-reaching impact on all NATO countries, African nations affected by Russia’s blockade of Ukrainian grain exports, and countries in the Far East facing surging oil and natural gas prices. This situation has engendered significant political, economic, and security concerns, triggering global ripples. In response to various geopolitical tensions, some NATO member states have escalated their defense budgets, while others have not made significant increases in the past decade. According to a NATO 2023 report, countries such as Belgium, Croatia, France, Norway, Portugal, Turkey, the United Kingdom, and the United States have not significantly raised their defense spending. Notably, among these nations, only the UK and

the US currently meet NATO's defense spending target of 2% of GDP. This leaves a total of 20 NATO members falling short of reaching the agreed-upon defense expenditure goal, highlighting a varied commitment to defense spending within the alliance.

The variation defense spending among NATO members poses a puzzle for political scientists. The question arises as to which theoretical perspective best explains the inclination of European states towards increased defense spending in response to these developments. Is the decision-making process better understood through the lens of systemic level theories, such as realism versus liberalism, which emphasize the anarchic international system, power dynamics, and institutional cooperation respectively? Or do domestic policy theories, which focus on internal political processes, offer a more precise explanation for variations in defense spending among these states?

The ongoing conflict between Ukraine and Russia serves as a pivotal context for exploring the impact of domestic political dynamics, specifically through the lens of partisanship theory, on foreign and defense policies. My research focuses on partisanship as a critical determinant of how countries respond to international crises, intending to test this theory against competing perspectives, such as theories of external threat, realism, and liberalism, especially in relation to NATO's involvement and the defense contributions of EU countries. While theories of external threat and domestic-oriented frameworks scrutinize the influence of internal political factors and public perception of international dangers on foreign policy, systemic theories like realism and liberalism offer contrasting viewpoints based on power politics, national interests, international cooperation, and the promotion of democratic values. By examining the Ukrainian-Russian conflict, my aim is

to underscore the significance of partisanship in shaping the decisions of EU member NATO states and their contributions to collective defense efforts, challenging the explanatory power of broader systemic theories. This approach not only highlights the role of domestic politics in international relations but also contributes to a deeper understanding of the multifaceted responses to global security challenges.

CHAPTER 3: Exploring the Influence of Partisan Politics on Defense Spending: A Critical Assessment of Party Impact

Do all members have to meet at least 2% GDP defense spending? On the one hand, Luxembourg demands an exemption from the target because of her sui generis situation (too small too rich) despite having the lowest ranking in defense spending (Pugnet 2023), but on the other hand Poland requests at least 3% defense spending (FOX News 2024) despite having the highest ranking (3.90%GDP) among all NATO members. In this context, the Ukrainian-Russian conflict presents an immediate threat, serving as a natural experiment to explore variations in defense spending within NATO—a process historically marred by delays in meeting established targets. The reluctance of many NATO members to increase defense spending significantly after the Cold War has been overtaken by the urgent needs imposed by the Ukrainian-Russian conflict. Notably, except for Norway, all NATO members that share a border with Russia—Estonia, Finland, Latvia, Lithuania, and Poland—have reached the organization’s 2% GDP defense spending target. Yet, there’s a significant disparity in how much each country allocates; Poland, for example, spends substantially more on defense than either Finland or Latvia. This variation in defense spending, both among countries bordering Russia and those without a shared border, like Germany, France, and Belgium, poses a puzzle. This discrepancy moves the discourse beyond simplistic view of external threats as the sole drivers of defense policy, underlining

the significant role that internal political dynamics and ideological orientations play in determining a nation's security strategy and foreign policy direction.

Political parties differ in the views they champion and policies they want (Dickovick et al. 2023, 287). In more concrete terms, the ideology of a political party is the main factor determining its policy outputs. For this reason, political parties are “specific carriers of specific policies” (McDonald and Budge 2005, 4). This is known as “parties matter” in the literature of political science (Hausermann, Picot, and Geering 2013, 224). It is even claimed that international relations are “electoralized”, which means that electoral outcomes and changes of political parties in the government composition matter for some aspects of foreign policies of states (Chrysogelos 2021, 17). Being in government means that governing political parties can carry out their policy preferences. The mechanisms of government such as budget and expenditure mandate permit governing political parties to translate their priorities into policy (Budge and Hofferbert 1990, 116).

3.1. Partisan Politics Theory

Partisan politics theory posits that there is a “linear and direct linkage” between the type of governing political party (social-democratic or conservative) and policy outcome (Hausermann, Picot, and Geering 2013, 221). The effect of partisan ideology on a policy choice at the parties and policy makers levels is central to partisan politics theory (Wenzerlburger and Zohnhofer 2021, 1055). Hence, government behavior is linked to parties' ideology (Greene and Licht 2018, 285). Political parties have sets of political values, which are identified as ideology (O'Neil 2024, 161). Antoine Destutt de Tracy, a French philosopher, coined the term ideology at the time of the French Revolution and used it as a name for the development of a science of ideas (Freedman 1999, 5). Later users

of the term described it in a different way than the introducer of the term. Hence, there are many definitions of ideology in political science. For instance, Downs define ideology as “a verbal image of a good society and of the chief means of constructing such a society” (Downs 1957, 96). According to Huntington, “a political ideology is a set of values and attitudes about the problems of state” (Huntington 2000, 90). Campbell et.al defines ideology as an attitude structure (Campbell et al. 1960, 192–93). Zaller’s definition is that ideology is an indicator of predispositions (Zaller 1992, 60). Integrated into a set of values and attitudes, ideology plays a crucial role within political parties. It reflects the values, ideas, and attitudes of politicians, elites, and party members towards the issues that are of interest to the parties.

The concept of left-right (liberal and conservative in their American versions) has been regarded as equal to ideology in accepted wisdom since the scope of the terms has come to include political meaning, referring to policy choices such as military intervention, multilateral cooperation, divorce laws, abortion, and foreign aid as well as economic content such as equality versus inequality or government intervention versus free enterprise (Arian and Shamir 1983, 139–40; Hofmann and Martill 2021, 309; Otjes, Van der Veer, and Wagner 2023, 1795–96). In sum, parties located in the same ideological party family (left-right or liberal-conservative) are assumed to make similar policy choices. This means that policy preferences of a political party can be deduced from its party family since leftist parties take different policy decisions than rightist parties. (Hausermann, Picot, and Geering 2013, 223).

Foreign policy, in democratic countries, is largely driven by partisan preferences in which the left-right cleavage has central place (Noel and Thérien 2008, 29). In this sense,

analyzing government composition is an attempt to explore the linkage between ruling party positions and foreign and security policy. According to the partisan politics theory, leftist parties tend to be more “dovish” and rightist parties tend to be more hawkish when it comes to the use of force. “Hawks” and “doves” are the concepts used in the parlance of the discipline to characterize the approaches of political actors to political issues. It is assumed that doves are cooperative whereas hawks are conflictual in the issue of the use of force (Kesgin 2020, 107–8). It is necessary here to point out that the categorization of political actors as “dovish” or “hawkish” should not be limited to their predispositions toward the use of force (Clark, Fordham, and Nordstrom 2016, 792). The strategic decisions made by political actors, whether to stand firm or to retreat in conflicts, along with their tendencies towards defense spending, are key markers of their ideological orientations.

In this sense, leftist parties advocate for reducing defense budgets in favor of prioritizing international agreements multilateralism, and the advocacy of human rights, social and environmental issues, and development aid to poorer nations. On the other hand, right-wing parties are in favor of trade-boosting aid and higher defense spending. Right-wing parties, being more “hawkish,” focus on immediate and hard security interests, defending the “national interest” as part of their broader ideological stance. In addition to these security-focused policies, the ideological orientation also influences the extent to which executives are restrained in foreign policy decisions. Leftist parties advocate for greater parliamentary oversight over the executive branch, especially in military missions, reflecting a commitment to checks and balances in the conduct of foreign affairs. Conversely, rightist parties are inclined towards supporting a less restrained executive,

favoring more autonomous decision-making in matters of national security and defense (Chrysogelos 2021, 12; Greene and Licht 2018, 284, 2018; McDonald and Budge 2005, 78; Otjes, Van der Veer, and Wagner 2023, 1795.1796; Palmer, London, and Regan 2004, 2; Raunio and Wagner 2020, 518; Wagner et al. 2017, 21). In summary, rightist parties tend to present themselves as more hawkish in their foreign policy and security stances, a characterization supported by research that finds hawkish positions to be more prevalent among rightist politicians (Heffington 2018, 65; Raunio and Wagner 2020, 518)).

This implies that if partisanship plays a role in this context, we will anticipate that parties with right-wing ideologies would increase defense spending in response to the perceived threat, while those with left-wing leanings might not, regardless of the Ukrainian-Russian conflict's threat to the region. In this scenario, the assessment of danger and the subsequent response in terms of defense spending are filtered through an ideological lens. Therefore, I posit:

H₁: The rightist the government of the EU-NATO-Member countries, the higher the defense spending since the Ukrainian-Russian conflict.

3.2. Alternative Explanations

Despite the potential for partisanship to explain observed behaviors in defense spending, it is crucial to evaluate this theory alongside alternative explanations. In this section, I will explore these alternative explanations, starting with the theory of external threat, which posits a reduction in polarization among parties, and moving on to the frameworks of realism and liberalism.

3.2.1. External Threat Theory: A Rival Perspective to Partisanship

While the role of domestic politics in shaping foreign and security policies in democratic countries is undeniable—ranging from the use of force and defense spending to foreign aid and votes in the UN General Assembly—these topics naturally stir political debates among political elites, the public, and media. Governments in democratic nations often strive to ensure that their foreign and security policies transcend domestic political debates. They achieve this by framing these policies within the concept of national interest, posited as the country’s *raison d’être* (Raunio and Wagner 2020, 516).

In democratic countries, foreign and security policies of the governments (for instance the use of force, defense spending, foreign aid and votes in the United Nations General Assembly etc.) are natural topics in the political debates not only among political elites but also public and media. Governments in democratic countries desire and endeavor that their foreign and security policies are kept out of the subject of domestic political debates. To this end, governments frame their foreign and security policies in the concept of national interest, which is also submitted as “the *raison d’être* of the country” (Raunio and Wagner 2020, 516). In this framework, the adage that “politics stops at the water’s edge³” is used in domestic politics to cease political struggles when the country is dealing with matters related to foreign and security policy (Frieden, Lake, and Schultz 2022, 147). Similarly, “rally round the flag” is an expression especially used by the incumbents to refer to putting political conflicts aside and the necessity of supporting government when international crises and militarized disputes erupt. Baker and Oneal (2001, 661) provide

³ The phrase is attributed to U.S. senator Arthur Vandenberg, who emphasized the necessity of pursuing a bipartisan foreign policy in the beginning years of the Cold War (Frieden, Lake, and Schultz 2022, 147).

context for understanding the political climate post-9/11, where both parties unified in support of the country's War on Terrorism efforts. This consensus was illustrated by the sweeping support for President George W. Bush, described as a significant wave of patriotism (Fordham 2018, 553). Such strong patriotic sentiments persisted, leading to a marked increase in support for the President among Democrats. Consequently, Democratic leaders were reluctant to criticize the President's approach to combating terrorism (Hetherington and Nelson 2003, 37–39). In essence, the American nation temporarily set aside partisan ideological differences in favor of a united front against terrorism.

In summary, aspiring to 'speak with one voice' symbolizes a call for non-partisanship in matters of foreign and security policy. In contrast to partisan politics theory assuming parties' differentiation in policies because of their diverging ideology, external threat hypothesis posits that external threats from a security crisis and a rival foreign power encourage consensus among rival political parties and decrease polarization (Myrick 2021, 921–30). Hence, this hypothesis accepts that external factors have superiority over domestic factors. In this regard, according to external threat hypothesis, because of NATO commitment to collective defense, all NATO members will increase their defense spending and will meet the target since parties in member states converge against Russian threat. In this case external threat hypothesis is (Myrick 2021, 930):

H₂: External threat from a security crisis causes partisan convergence, leading to increased defense spending for all NATO countries since the Ukrainian-Russian conflict.

The diversionary theory of conflict suggests that state leaders might initiate conflicts to enhance domestic political support, particularly when they believe such actions will unify the nation through nationalism and redirect attention away from internal

problems (Levy and Thompson, 2010). This theory underscores that the effectiveness and implementation of diversionary strategies are not uniform across states, with deception playing a vital role in the success of these strategies (Fordham, 2018). In times of domestic unrest, leaders are more prone to utilize external threats as a means to consolidate internal support. An illustrative example of this is the U.S. military intervention in Grenada in 1983, which demonstrates how leaders can effectively use scapegoating to garner public support, even without significant external threats. The theory further identifies triggers such as the risk of coups and reduced presidential approval as factors prompting leaders to engage in diversionary conflicts (Powell, 2012; Fordham, 2018). Additionally, economic crises offer opportunities for leaders to “rally round the flag” by focusing on external threats (Fordham, 2018). While NATO states may not have directly provoked threats, Russian aggression has potentially been used by leaders to divert attention from domestic issues, framing themselves as potential targets. This tactic aligns with the diversionary theory’s premise that leaders may exploit international tensions to strengthen their domestic standing amidst various crises.

H₃: Leaders-those with economic difficulties are more likely to frame this in terms of external threat and expand defense expenditures.

3.2.2. Systemic Level Theories: Realism and Liberalism

3.2.2.1. Realism

Despite the evolving literature on domestic politics and its impact on international relations, realism, with its focus on the overarching influence of the international system, has traditionally downplayed the role of domestic factors, including partisanship. This

perspective emphasizes the primacy of state behavior as shaped by global structures, often at the expense of internal political dynamics.

Realism, one of the competing and systemic theories related to foreign policy and security issues such as use of force and defense spending, focuses on power and distribution of material capabilities in the international system. Balancing (balance of power or/and balance of threat) is common and central to realist view of international relations (Sperling and Webber 2016, 22). George Kennan, one of the significant realists who is the intellectual architect of containment policy in the Cold War era, warned in an interview, even in 1998, that NATO enlargement was a “tragic mistake” (Friedman 1998). Kennan predicted that Russia would progressively respond to NATO’s enlargement and it would lead to trouble in Eastern Europe (Friedman 1998). Similarly, John J. Mearsheimer, another influential realist scholars, argues that Russia was provoked by NATO enlargement into Ukraine (Mearsheimer 2014, 77). According to Mearsheimer, the liberal worldview in the Western elites to keep Europe “whole and free” based on economic interdependence, democracy and rule of law failed because Russia played the game according to *realpolitik* to protect its strategic interest in its near abroad (Mearsheimer 2014, 78–84).

In contrast to partisan politics theory, realism sees states as unitary political units (Legro and Moravcsik 1999, 17) in anarchical international system and avoids “opening states and looking inside them” (Frieden, Lake, and Schultz 2022, 147–50). Realism believes that “international politics is a struggle for power” (Morgenthau 2022, 63). States can never be sure about other states’ purpose and survival is the main goal (Mearsheimer 2022, 67). Realism considers power in relative terms and as a zero-sum game. Gains for one state necessarily mean losses for another state (Frieden, Lake, and Schultz 2022, xxxv).

In neorealism, “the ordering principle of the system” is anarchy and the units of the system are distinguished by their capabilities (Waltz 1979, 87–97). State behavior such as balancing or bandwagoning depends on the structure of the system (Waltz 1979, 125–26). A bipolar system of international politics is structurally different from a multipolar system (Waltz 1979, 98). According to Waltz, international system in the post-World War II era became a bipolar one (Waltz 1979, 71) and the world since 1945 has been stable (Waltz 1979, 121, 177) Waltz claimed that “safety for all states depends on the maintenance of a balance among them”(Waltz 1979, 132). For this reason, Mearsheimer claims that when a powerful state pursues a “liberal hegemony strategy” of spreading liberal democracy at the expense of balance-of-power politics, international instability and conflict should not be seen as a surprise (Mearsheimer 2018, 6). In this sense, Mearsheimer argues that NATO enlargement, especially into Ukraine, antagonized Russia and led to the Ukraine crisis (Mearsheimer 2018, 174). Furthermore, the relative decline in the United States hegemony increases the risk of conflict with the challenger because hegemonic power’s efforts to preserve current political and economic arrangements can become sources of conflict as the challenger rises (Levy and Thompson 2010, 44).

In the search of security in an anarchic system, state may form alliances (Waltz 1979, 166) like NATO. It is noteworthy here, Waltz calls NATO as a treaty of guarantee given by the US to its European allies (Waltz 1979, 169, 182). In addition, neoclassical realists assume that states respond to the uncertainties of international anarchy by seeking to control and shape their external environment (Rose 1998, 152). The relative material power capabilities drive a country’s foreign policy (Rose 1998, 146). As their relative

power rises states will seek more influence abroad, as it falls their actions and ambitions will be scaled back accordingly (Rose 1998, 152).

In realism, state decisions are not made by parties according to ideologies because they all face a systemic threat. Interests of states are not shaped by domestic factors (Frieden, Lake, and Schultz 2022, 147). Party differences are unimportant and dominated by international conditions in realism (Fordham 2002, 82). More concretely, realists claim that parties controlling state should not differ in responses to changing international balance of power (Fordham 2002, 82). Put differently, states respond similarly to changing international conditions. For instance, all NATO states should increase their defense spending after the Russian invasion of Ukraine through realism lens because NATO states will conduct a policy of balancing Russia in the war. To provide a regional security and stability for Europe will compel NATO states to help Ukraine and to modernize their military to be ready for an emergency case.

The primary goal of states has been the conquest of territory throughout history (Gilpin 1981, 23) In this regard, geography and military readiness are important elements of national power in realist thought (Morgenthau 1948, 80, 88). Geographical location can constitute strength (the factor of ocean barrier for the US) or weakness (Poland's location between Germany and Russia) (Morgenthau 1948, 81, 135). States are territorial units (Starr and Thomas 2005, 125). Territorial disputes among states generate conflicts (Schultz 2015, 125). Hence, border is often used as a key variable in the literature to deal with spatial context of international politics (Starr and Thomas 2005, 123) and is a robust variable for measuring conflict initiation (Starr and Thomas 2005, 136; Toft 2014, 185-186, 193). Sharing border with strong states make weak states vulnerable and weaker states are likely

to join the strongest coalition (Levy and Thompson 2010, 42). Highlighting the vulnerability of bordering nations, Russia's annexation of Crimea and subsequent air and sea incursions into Finland starkly underscored the heightened risks these countries face. These aggressive actions particularly have intimidated Finland, a nation sharing its border with Russia (Alberque and Schreer 2022, p. 67) This proximity to a perceived aggressor catalyzed a significant shift in public opinion within Finland regarding NATO membership. Initially, support for joining NATO was relatively low, at 24% in 2021. However, as tensions escalated with the onset of the Ukraine crisis, this figure surged to 68% by April 22, 2022, while opposition to NATO membership dwindled to a mere 15% (Fittante 2023, p. 3).

Countries that were once part of the Soviet Union (FSU countries) however are even more insecure amidst the Russian aggression. The 2008 war in Georgia, the annexation of Crimea in 2014, and the ongoing conflict in Ukraine have all underscored the risks these nations face due to their proximity to Russia and their historical ties. Their geographical location places them directly on the front lines of potential Russian expansionist policies, while their historical experience as former Soviet republics adds an additional layer of complexity due to their relationships with Russia. This shared history includes periods of direct control and influence from Moscow, making these states acutely aware of the potential for Russian interference and aggression. Consequently, their past as part of the Soviet Union, coupled with recent aggressive actions by Russia in the region, heightens their sense of threat and concern for their sovereignty and security.

In sum, the bipolar characteristic of the international system during the Cold War years paved the way for the dominance of realist approach in international politics. Hence,

domestic factors, the second image in Kenneth Waltz's terminology, have been downplayed in the study of international relations (IR) because of dominance of realism in the IR discipline (Chryssogelos 2021, 12). Realism still has a central place in the scholarship of international politics. In this framework, realist hypotheses are:

H₄: A security crisis in the anarchic international system causes an increase in defense expenditure of NATO states.

H₅: Those states bordering Russia are more likely to increase their defense spending.

H₆: Former Soviet Union members are more likely to increase their defense spending.

3.2.2.2. Liberalism

Another competing and systemic theory related to foreign policy and security issues is liberalism. Liberalism is normatively different from realism. In liberalism, freedom is the highest value and "promoting freedom will produce peace" (Doyle 1986, 1152). Since liberals are optimists about human nature, they believe that common interests work for cooperation (Frieden, Lake, and Schultz 2022, xxxvi). Power and rules can cohabit and power is more lasting and legitimate when exercised in a system of rules which are based on a consensual process (Ikenberry 2011, xiv-xv). Open markets, international institutions, democratic community, shared sovereignty, collective problem solving and rule of law are important features of liberal approach (Ikenberry 2011, 2). Liberalism claims that democracy, free trade and interdependence, international law and organizations will ease the path to peace (Fordham and Walker 2005, 141). Put differently, democracy,

international trade and international institutions have pacifying effects and facilitate cooperation (Frieden, Lake, and Schultz 2022, xxxvi).

The end of Cold War can be seen as the success of the liberal international order and culminated in the consolidation of the American-led liberal order (Ikenberry 2011, 223). Liberal theorists claimed that NATO's expansion could not be a security threat for Russia because peaceful democratic neighbor states would not be danger for Moscow (Zubok 2023, 148). In this regard, liberals advocated the enlargement process of NATO due to its expected positive and pacifying effect on international relations.

Democratic peace theory argues that democracies interact more peacefully with each other (Dafoe, Oneal, and Russett 2013, 201). Within this context, it's plausible to suggest that more democratic nations allocate fewer resources to defense compared to less democratic counterparts. This notion stems from the principle that differences create divisions while similarities foster unity (Gartzke and Weiseger 2013, 171–72). To put differently, increasing integration reduces interstate conflicts and conflicts weaken trade (Schultz 2015, 127). In democratic nations, the convergence of audience costs, accountability, and electoral repercussions forms a significant deterrent against reckless military engagements (Levy and Thompson 2010, 112). Social preferences converge around the continuation free trade as a means of accumulating wealth (Moravcsik 1997, 517, 528, 530). In sum, interdependence and democracy contribute to “liberal peace” (Oneal and Russett 1999, 3). This nexus heightens the costs of war through public scrutiny and the potential for electoral defeat for leaders who mishandle conflicts or engage in unpopular wars. The democratic process, with its emphasis on public approval and regular elections, ensures leaders are directly accountable to their citizens. This accountability,

combined with the risk of political and electoral consequences, compels leaders to carefully consider the ramifications of military actions, aligning foreign policy decisions more closely with the electorate's preferences and values. Consequently, such shared democratic characteristics encourage more peaceful interactions among democracies (Dafoe, Oneal, and Russett 2013, 201).

Beyond focusing solely on regime type, scholars adhering to liberalist perspectives have expanded their analysis to explore how the integration within a global order is facilitated by memberships in international organizations. International organizations are platforms for socialization, common dialogue, cooperation, credible commitments and dispute settlement. Increasing shared international organization participation lowers the length of international disputes by allaying commitment worries (Shannon, Morey, and Boehmke 2010, 1123). Pevehouse and Russett argue that not all international governmental organizations (IGO) but densely democratic IGOs will help to reduce the risk of militarized interstate disputes (MID) (Pevehouse and Russett 2006, 994).

In sum, according to liberal scholars, the expansion of NATO is seen as a means to promote democracy and capitalism in Central and Eastern Europe (Goldgeier and Shiffrinson 2023, 12). Democratic states are guided by the needs of their citizens, therefore, they spend less on defense issues since a small part of the society, namely a small elite, might benefit from war (Fordham and Walker 2005, 142). Furthermore, high defense spending will not only jeopardize public goods but also civil liberties in democratic states (Fordham and Walker 2005, 142–43). Hence liberal, democratic and economically interdependent states should allocate fewer resources to defense and military, thus, this

process will resolve security dilemma and prevent conflict spiral (Fordham and Walker 2005, 142–45).

Liberalism, contrasting with realism, thus incorporates a normative approach and emphasizes domestic factors, notably the type of regime, and integration with the global order in its analysis of international relations. It is essential to highlight that while liberals do not categorically oppose an increase in defense spending by democratic states (Fordham and Walker, 2005, p. 148), they generally do not support such measures in principle. It's important to approach classic liberalist predictions with caution especially within this current context. Liberalism, emphasizing domestic factors does not offer clear predictions regarding the implications for defense spending when states—such as NATO allies—encounter conflicts, exemplified by the war between Russia and Ukraine. This theoretical perspective might conceptualize the conflict as a confrontation between the values of peace and democracy against authoritarianism. In this context, the perceived threat from Russia can also be interpreted as a challenge to the prevailing democratic values and the liberal order, potentially motivating an increase in defense spending. This perspective suggests that when democratic states perceive their values and systemic stability as being under threat, there may be a greater inclination to bolster their defense capabilities as a protective measure. Thus, we test the below competing hypotheses together.

H_{7a}: States with higher levels of democracy are more likely to increase their budget spending.

H_{7b}: States with more memberships in International Organizations are more likely to increase their budget spending.

H_{8a}: *More democratic states are less likely to increase their budget spending.*

H_{8b}: *States with more memberships in International Organizations are less likely to increase their budget spending.*

Table 1. Theories and Hypotheses

<p>Domestic Theories</p> <p>Partisan Politics Theory:</p> <p><i>H₁: The rightist the government of the EU-NATO-Member countries, the higher the defense spending since the Ukrainian-Russian conflict.</i></p>
<p>External Threat Theory:</p> <p><i>H₂: External threat from a security crisis causes partisan convergence, leading to increased defense spending for all NATO countries since the Ukrainian-Russian conflict.</i></p>
<p>Diversionsary Theory: <i>H₃: Leaders-those with economic difficulties are more likely to frame this in terms of external threat and expand defense expenditures.</i></p>
<p>Systemic Theories</p> <p>Realism:</p> <p><i>H₄: A security crisis in the anarchic international system causes an increase in defense expenditure of NATO states.</i></p> <p><i>H₅: Those states bordering Russia are more likely to increase their defense spending.</i></p> <p><i>H₆: Former Soviet Union members are more likely to increase their defense spending</i></p>
<p>Liberalism:</p> <p><i>H_{7a}: States with higher levels of democracy are more likely to increase their budget spending.</i></p> <p><i>H_{7b}: States with more memberships in International Organizations are more likely to increase their budget spending.</i></p> <p><i>H_{8a}: More democratic states are less likely to increase their budget spending.</i></p> <p><i>H_{8b}: States with more memberships in International Organizations are less likely to increase their budget spending.</i></p>

CHAPTER 4: Research Question, Data, Measurement and Findings

This study explores the connection between the ideological leanings of governing political parties (along the left-right spectrum) and defense spending within EU member states that are also NATO members, particularly in light of the Russian invasion of Ukraine that began in 2022. The analysis incorporates data from 20 EU member states within NATO, specifically covering the two-year period following the start of the invasion, encompassing the years 2022 and 2023. The research employs a cross-sectional unit of analysis, focusing on the defense expenditure and the political party orientation within these countries during the specified timeframe.

The decision to focus on the two-year period following the onset of the Russian invasion of Ukraine in 2022 is aimed at capturing how countries respond to an exogenous shock—the crisis that presents an immediate and acute threat. This specific timeframe is chosen to measure short-term reactions to this crisis, under the premise that the need and urgency to address the security challenge are most pronounced in the immediate aftermath. Short-term reactions reflect the immediate policy responses and defense spending adjustments made by governments in the face of such a significant geopolitical event. These early responses are crucial for understanding how nations perceive and act upon

urgent security threats. By focusing on the short-term, the research aims to shed light on the dynamics of crisis response and policy adjustment, acknowledging that long-term adjustments may differ as the immediate pressures of the crisis evolve or subside.

4.1. Dependent Variable

Defense expenditure data I use were collected from member countries by NATO. NATO publishes this data on a regular basis since 1963⁴. Each NATO member state's Ministry of Defense reports current and estimated future defense expenditure according to an agreed definition of defense expenditure. The amounts represent payments by a national government made, or to be made, during the fiscal year to meet the needs of its armed forces, those of Allies or of the Alliance. The cut-off date for defense expenditure data used in this report is 7 July 2023. Figures for 2022 and 2023 are estimates based on 2015 prices. I calculated the percentage of defense expenditure based on mean values of these two years and constructed an excel column for my regression.

4.2. Independent Variable

The independent variable in this study is the left-right ideological scores of governments in EU member states of NATO for the years 2022 and 2023⁵. There are

⁴ Website: https://www.nato.int/nato_static_fl2014/assets/pdf/2023/7/pdf/230707-def-exp-2023-en.pdf

⁵ The study excludes non-EU NATO members, specifically the UK and the US, due to their status as hegemonic powers in the international system, which could skew the measurement of defense spending influences. Among the 23 EU member states in NATO, Sweden is omitted because of the absence of relevant data in NATO's reports. Additionally, Slovenia and Bulgaria are excluded because some of their ruling political parties, namely "Prodalzhavame promyanata-PP" (We Continue the Change) in Bulgaria and "Gibanje Svoboda-GS" (Freedom Movement) in Slovenia, lack RILE scores in the Manifesto Project

multiple methodologies for measuring the ideology of political parties. One approach is to evaluate how parties prioritize different issues, a method outlined by Budge and Farlie (1983). Another strategy focuses on analyzing the policy choices and outcomes attributable to political parties. This research adopts a method that assigns weights to political parties based on their proportion of cabinet seats. Utilizing the seat percentage of political parties in power to weigh their ideological scores is a method validated by political science research as an effective way to assess ideological positions (McDonald and Budge 2005, 153). These weights are then multiplied by the parties' respective positions on the left-right ideological spectrum. For instance, in the case of coalition governments⁶, the procedure involves calculating the weight of each party by counting the ministries they control. The RILE (right-left) index score of each ruling party is multiplied by the number of ministries it holds within the government. The ensuing values, including their positive and negative aspects, are then aggregated. The final step involves dividing the aggregate sum by the total number of cabinet seats across each country to ascertain a composite score that reflects the governing parties' left-right orientation. This calculated figure represents the government's overall RILE score.

database. These parties, established in 2021 and 2022, respectively, ascended to power quickly and thus are not included in the analysis due to the unavailability of comprehensive ideological data.

⁶ Axelrod's conjecture is that government coalitions are policy connected (Axelrod 1970) and this brings together ideologically closest parties (McDonald and Budge 2005, 10). In this sense, the Left-Right positions of governments can be said as ideological stance of the governments in a single dimension of policy space. Except for, Greece 19 of 20 countries in the Figure 2. have coalitions governments.

The Left-Right scale (RILE) I use for measuring ideologies was developed originally by the Manifesto Research Group (MRG) (Volkens and others 2014, 85). The Comparative Manifestos Project (CMP) continued the work of MRG between 1989-2009⁷. Manifesto Research on Political Representation (MARPOR) has been the successor to CMP since 2009 (Budge and McDonald 2012, 609). RILE scores of political parties are constructed out of the original 57 policy categories produced by the MRG for classifying (quasi-) sentences in the selected texts such as party programs (Volkens and others 2014, 86). Twelve categories from the coding scheme are described as right-wing and the other twelve categories are described as left-wing categories.

The formula to aggregate the scores of the 24 categories to a common score requires taking the sum of the per-variables of all right-wing categories and subtracts the sum of all left-wing categories. The equation follows: $RILE = R - L$. In the equation, R is the sum of per-variables of right-wing issues and L the sum of per-variables of left-wing issues. The minimum score of the RILE scale is -100 (if a party only touches upon left-wing issues in parties' election manifests) and the maximum score is +100 (if a party only touches upon right-wing issues). However, these minimum and maximum scores are empirically rare since parties generally consider both – left and right issues although they discuss them at different degrees. The data I use here were collected from the website of Manifesto Project

⁷ Website: <https://manifesto-project.wzb.eu/information/documents/information>

(Lehmann et al. 2023) for the RILE scores of political parties and Wikipedia for the government composition.

4.3. Control Variables

In addressing alternative explanations, I incorporate a range of control variables. First, to delve into realist expectations about state behavior, I introduce two separate binary variables: one for states sharing a border with Russia and another for states that are former members of the USSR. To test the diversionary theory, I include a control for economic crises which is coded as 1 if a decrease at least 0.5% in GDP per capita. The data on GDP per capita comes from World Bank data set. Third, in evaluating liberalist expectations. I control both IO memberships and the level of democracy. The former is measured using data from the Correlates of War dataset, the latter is measured using data from the Varieties of Democracy (V-Dem) project.

In my analysis, I employ Poisson regression, a statistical model designed specifically for count data. This choice is highly suitable for situations where the variable under study is measured by the number of events occurring within a certain time or area. Such is the case in our research, where defense spending is expressed as a percentage of GDP. This metric inherently assumes values that are non-negative, making it a fitting candidate for Poisson regression. This technique is adept at dealing with variables that represent counts or frequencies—such as our defense spending figures—which cannot be less than zero.

4.4. Findings

Table 2 shows the results of poisson analysis. In this analysis, defense spending is a function of Left-Right positions of government, weighted according to governing political parties' share of seat in the cabinet.

Table 2. Defense spending as a function of Left-Right Positions of Governments

VARIABLES	Defense Expenditures
RILE	0.0128* (0.00711)
Border	0.572*** (0.144)
Former Soviet Union Member	-0.356 (0.278)
Regime Type	0.692 (1.063)
Int. Organization Membership	-0.00405 (0.00424)
Economic Crisis	-0.290 (0.224)
Constant	0.366 (0.723)
Observations	20
R-squared	
Standard errors in parentheses *** p<0.01, ** p<0.05, * p<0.1	

The results presented in the table indicate that both ‘border’ and ‘RILE’ variables are statistically significant within the model, supporting the hypothesis that a right-leaning government is more likely to increase defense spending. This finding corroborates the Partisan Politics Theory, suggesting it can account for variations in defense expenditure among EU members of NATO. The Ukraine crisis has led to a rise in defense spending for some countries; however, not all countries have increased their defense budgets. This observation challenges the External Threat Theory, as its predictions do not uniformly hold true. Moreover, the ‘economic crisis’ variable’s insignificance suggests that the Diversionary Theory does not apply in this context. Turning to systemic theories, we find that, although not statistically significant, countries with higher levels of democracy are inclined to allocate more to defense spending. Similarly, countries with fewer International Organization (IO) memberships tend to spend more on defense compared to those with extensive IO memberships. This trend contradicts liberalist expectations, which would typically anticipate a reduction in defense spending with increased international cooperation and democratic governance. The minimal variation in IO memberships and democracy scores among EU countries may contribute to this unexpected outcome. Realist perspective is partially validated; countries sharing a border with Russia are more likely to increase their defense budgets, reinforcing the notion that geographical proximity to a potential adversary influences defense spending. Conversely, the insignificance of former Soviet Union memberships, when controlling for neighborhood factors, suggests that

contemporary border proximity with Russia poses a greater perceived threat than historical political alignments.

4.5. Discussion, Limitations and Future Research:

In this section, I outline several limitations of this research and propose directions for future investigations. First, this study focuses on short-term trends in defense spending among NATO members in response to the immediate context of the Russian invasion of Ukraine. While short-term analysis provides valuable insights into rapid adjustments and reactions, long-term trends might paint a different picture regarding defense expenditure and commitments among NATO members. Over the years (Table 3) specific member states such as Latvia, Lithuania, Poland, and Romania have established national laws or political agreements to meet NATO's spending target of 2% of GDP on defense. According to NATO's estimates, the number of countries meeting this target has been increasing. In 2022, countries like Estonia, Greece, Latvia, Lithuania, Poland, the United Kingdom, and the United States achieved this goal. The projections for 2023 suggest further compliance, with Estonia, Finland, Greece, Hungary, Latvia, Lithuania, Poland, Romania, and the Slovak Republic, alongside the United Kingdom and the United States, reaching the target. This marks a notable increase to 11 out of 31 NATO members, with new additions including Finland, Hungary, Romania, and the Slovak Republic. In sum, most members (27 of 31)⁸

⁸ Since Sweden is not included in NATO's reports, the total number of NATO members in the figures is 31.

increased their defense spending as a share of GDP in 2023 compared to 2022 (Figure 2). The year 2023 has the most increasing annual real change, 8.30% since 2014 and this increase is four times bigger than annual real change of 2022 (2.05%). This evolving commitment among NATO members to fulfill agreed-upon defense spending goals over a longer timeline suggests an adjustment phase and a possibly different scenario from the immediate post-invasion period. The long-term trend indicates a strengthening resolve and increasing alignment with NATO's financial commitment targets, highlighting the need to look at both short-term and long-term trends to get a complete picture.

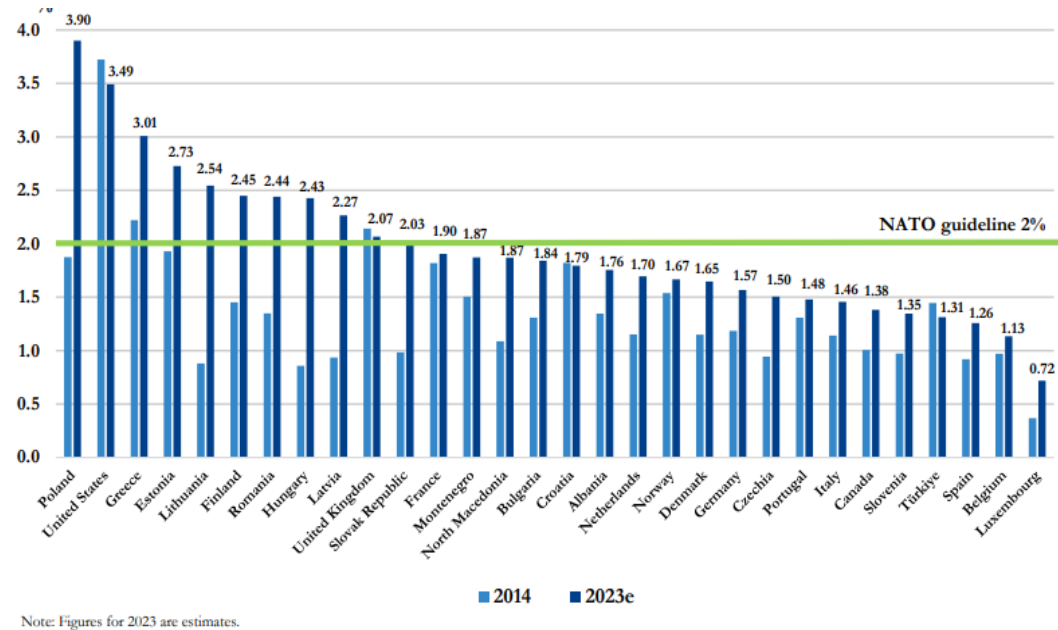
Table 3. Defense Expenditures of EU Member NATO Countries (Share of real GDP)

	2014	2015	2016	2017	2018	2019	2020	2021	2022e	2023e
Share of real GDP (%)										
Albania	1.35	1.16	1.10	1.11	1.16	1.28	1.30	1.24	1.21	1.76
Belgium	0.97	0.91	0.89	0.88	0.89	0.89	1.01	1.05	1.19	1.13
Bulgaria	1.31	1.25	1.24	1.22	1.45	3.13	1.59	1.52	1.62	1.84
Canada	1.01	1.20	1.16	1.44	1.30	1.29	1.42	1.27	1.22	1.38
Croatia	1.82	1.76	1.60	1.64	1.55	1.61	1.71	1.98	1.82	1.79
Czechia	0.94	1.02	0.95	1.03	1.10	1.18	1.30	1.39	1.34	1.50
Denmark	1.15	1.11	1.15	1.14	1.28	1.30	1.38	1.32	1.38	1.65
Estonia	1.93	2.03	2.07	2.01	2.01	2.05	2.30	2.02	2.16	2.73
Finland	1.45	1.45	1.42	1.38	1.39	1.45	1.53	1.40	1.68	2.45
France	1.82	1.78	1.79	1.78	1.81	1.81	2.00	1.91	1.88	1.90
Germany	1.19	1.19	1.20	1.23	1.25	1.35	1.51	1.46	1.49	1.57
Greece	2.22	2.31	2.40	2.38	2.54	2.45	2.91	3.70	3.86	3.01
Hungary	0.86	0.90	1.00	1.19	1.01	1.34	1.76	1.68	1.82	2.43
Italy	1.14	1.07	1.18	1.20	1.23	1.17	1.59	1.57	1.51	1.46
Latvia*	0.94	1.03	1.44	1.59	2.06	2.02	2.15	2.07	2.08	2.27
Lithuania*	0.88	1.14	1.48	1.71	1.97	2.00	2.07	1.97	2.47	2.54
Luxembourg	0.37	0.42	0.38	0.50	0.50	0.55	0.58	0.47	0.62	0.72
Montenegro	1.50	1.40	1.42	1.34	1.37	1.33	1.73	1.55	1.41	1.87
Netherlands	1.15	1.13	1.16	1.15	1.22	1.32	1.41	1.38	1.63	1.70
North Macedonia	1.09	1.05	0.97	0.89	0.94	1.16	1.24	1.47	1.62	1.87
Norway	1.54	1.58	1.73	1.71	1.72	1.84	1.97	1.72	1.51	1.67
Poland*	1.88	2.23	2.00	1.89	2.02	1.99	2.23	2.22	2.40	3.90
Portugal	1.31	1.33	1.27	1.24	1.34	1.37	1.43	1.53	1.42	1.48
Romania*	1.35	1.45	1.43	1.73	1.79	1.84	2.01	1.86	1.72	2.44
Slovak Republic	0.98	1.11	1.12	1.10	1.22	1.70	1.92	1.74	1.81	2.03
Slovenia	0.97	0.93	1.00	0.98	1.01	1.05	1.06	1.24	1.25	1.35
Spain	0.92	0.93	0.81	0.91	0.93	0.91	1.01	1.04	1.07	1.26
Türkiye	1.45	1.38	1.45	1.51	1.82	1.86	1.86	1.61	1.36	1.31
United Kingdom	2.14	2.03	2.08	2.07	2.10	2.08	2.35	2.30	2.16	2.07
United States	3.72	3.52	3.52	3.31	3.29	3.51	3.64	3.48	3.45	3.49
NATO Europe and Canada	1.43	1.42	1.44	1.48	1.51	1.54	1.72	1.67	1.65	1.74
NATO Total	2.58	2.48	2.49	2.40	2.41	2.54	2.71	2.60	2.57	2.64

Source: [https://www.nato.int/nato_static_fl2014/assets/pdf/2023/7/pdf/230707-](https://www.nato.int/nato_static_fl2014/assets/pdf/2023/7/pdf/230707-def-exp-2023-en.pdf)

[def-exp-2023-en.pdf](https://www.nato.int/nato_static_fl2014/assets/pdf/2023/7/pdf/230707-def-exp-2023-en.pdf)

Figure 2. Defense expenditure as a share of GDP (%) (based on 2015 prices and exchange rates)



Source: [NATO – News: Defense Expenditures of NATO Countries \(2014-2023\), 07-Jul.-2023](#)

Second, the observation that about half of the countries meeting the 2% defense spending target in 2023 are those sharing a border with Russia underscores the potential impact of geographical proximity to perceived threats on defense budget allocations. This finding, alongside statistical results indicating that realist tendencies remain evident in defense spending decisions, suggests the importance of not exclusively favoring domestic or systemic theories. Instead, it highlights the value of a complementary approach that

incorporates both domestic political dynamics and systemic international relations theories to fully understand the complexities of defense spending decisions.

Third, while the initial focus of this study was on the defense spending reactions of EU member states in NATO to the Ukraine-Russia conflict, I have replicated this analysis by adding the Bosnia crisis as additional data points, given its significance as a threat to the EU stemming from the dissolution of Yugoslavia, which endangered regional and border security. This case was chosen for its similarity in terms of posing a direct threat to European security. My results remain robust. The results from the Bosnia crisis study reveal that the only other statistically significant variable is border. The remaining variables (former Soviet Union member, economic crisis, regime type and international organization membership) are not statistically significant. The results are in the Appendix.

Future research should consider examining cases that are markedly different, such as NATO's intervention in Libya, to determine if the findings diverge when the threat is not as immediate or directly impacting EU border security. Such studies could offer insights into the variability of defense spending responses under different types of security threats and help understand the broader applicability of the theoretical frameworks employed here.

Conclusion

This study sheds light on the role of political parties and foreign policy decisions in representative democracies by showing how the positions of leftist and rightist government shape the foreign and security policies. It casts light on the normative debate related to the positions of leftist and rightist government in foreign and security policy. More concretely, it examines whether political parties follow policy preferences in line with their ideology or take unexplainable and changing positions on political issues based only on reactions of voters which are majority views of that specific moment.

My analysis shows political parties in power and their ideologies shape policy preferences in line with their ideology in foreign policy matters, particularly defense spending. The findings in this paper show that the right governments in democracies are more associated with the more spending on defense. While evidence of partisanship's influence on defense spending is notable, it's also imperative to recognize the impact of some systemic forces. The findings revealed that European states did not uniformly increase their defense spending as realism anticipated. However, border states emerged as particularly vulnerable, facing heightened security threats due to their proximity to potential aggressors like Russia. This underscores the relevance of realist principles to some extent, urging us to look at both domestic and systemic factors.

Future research could extend the analysis of the Ukraine crisis's influence on military spending, not just confirming its impact but also discerning whether it serves as a direct trigger or simply accelerates existing trends in defense allocations. This investigation could be enriched by incorporating additional data points to examine the relationship between the ideological spectrum of governing political parties and defense spending decisions more comprehensively, moving beyond the singular context of the Ukraine crisis. Moreover, while this study has focused on the dichotomy of right and left parties, the role of median parties—or centrist political forces—remains an area ripe for exploration. Understanding how these parties influence government defense budgets could shed light on the ways in which political centrism impacts national security funding. Such inquiries would not only broaden our grasp of the domestic underpinnings of foreign and defense policies but also contribute significantly to the discourse on how internal political dynamics shape a state's actions on the global stage.

**Appendix. Defense Spending during the conflicts in Bosnia and Herzegovina
and Ukraine**

VARIABLES	Defense Expenditures
RILE	0.00766* (0.00442)
Border	0.366*** (0.141)
Former Soviet Union Member	-0.109 (0.365)
Regime Type	0.312 (0.981)
Int. Organization Membership	0.000673 (0.00907)
Economic Crisis	-0.354 (0.262)
Constant	0.374 (0.605)
Observations	30
R-squared	

Standard errors in parentheses
*** p<0.01, ** p<0.05, * p<0.1

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