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**SMALLER EU MEMBER STATES
AND HOW THEY NAVIGATE
INTERNATIONAL SECURITY
FRAMEWORKS – THE CASE OF
PORTUGAL AND ESTONIA**

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Introduction

This paper delves deeper into the often-overlooked role of smaller member states within international and regional security and defence frameworks by exploring their experiences and strategic choices within the EU and NATO security and defence frameworks. It is essential to understand how smaller member states' interests often differ significantly from those of larger members.

Despite their constrained power and relatively modest economic and military resources in comparison to larger neighbours, small states hold certain advantages that enhance their capacity to influence global affairs. While they may lack the military and economic might as larger nations, their persistence, determination, and steadfastness can yield significant outcomes. Effective policymaking can elevate a small state into an influential player on the international stage.

This paper will analyse two case studies: Portugal and Estonia. The Portuguese case highlights NATO's crucial role in safeguarding its defence and at times contradictory stance on European strategic autonomy. Estonia serves as a compelling case study for understanding how smaller member states navigate and contribute to international security institutions, especially within NATO and the EU, given its strategic location and proactive defence efforts.

Through reviewing previous research, this analysis aims not only to contribute to the scholarly understanding of European security dynamics but also to offer practical implications for policymakers and smaller EU member states striving to optimise their impact within the broader framework of common security and defence initiatives. This analysis will not discuss why small states join, or the power dynamics within or outside the EU and NATO, as these topics have been extensively researched by scholars (Reiter & Gärtner, 2001; Keohane, 1971; Hey, 2003; Walt, 1997). This phenomena can be explained by Shelter Theory, which examines how smaller states address challenges from limited capabilities by aligning with larger alliances and institutions (Thorhallsson, 2019). Instead of exploring the 'why', this article will focus on the 'how', aiming to clarify the methods and strategies small states employ to maximize their influence within the EU and NATO.

Theoretical Framework

The narrative of European integration often emphasises the role of the major powers. Progress or lack thereof is typically analysed in terms of the actions and interests of France, Germany, and the UK, as the European project has progressed amid both moments of conflict and cooperation among these member-states (Moravcsik, 1993). Consequently, scholars focusing on smaller states tend to examine the challenges and opportunities for influence confronted by smaller nations within a framework largely shaped by the preferences of the dominant trio.

Many academics concur that power imbalances among EU member states are particularly pronounced in these spheres (Duke 2001; Wivel 2005). Consequently, small states grapple with significant challenges and dilemmas of 'abandonment or entrapment' in these areas (Wivel, 2005, 24). However, participation in EU security and foreign policy activities offers small member states opportunities to exert influence on global affairs and transcend their relative size (Archer, 2010; Bailes and Thorhallsson, 2012).

Nevertheless, the imbalance in resources persists and holds significance. Wivel underscores that for small states to capitalize on advancements in the EU's security and defence realms, they must acknowledge the unequal distribution of decision-making power, which mirrors the uneven allocation of resources for operations and the associated risks (Wivel, 2005). Wivel suggests that rather than attempting to constrain the actions of the three biggest member-states, small EU countries should adapt their strategies and enhance their influence by adopting a "smart state" approach, prioritising institutional innovation and flexibility.

In this InfoFlash, small states include all nations with defence spending below \$10 billion USD, even if they are meeting NATO's threshold of 2% of GDP to be spent on defence annually. Out of its 32 members, only 11 fulfil this criterion (NATO, 2023). This encompasses all NATO members except the United States, the United Kingdom, France, Germany, Italy, Canada, Turkey, Spain, and the Netherlands (Wijk, 2005).

Solidarity and shared values form the foundation of security within NATO and EU member states. Small states are integral members of this multi-institutional security community, where their perspectives must be respected and considered. This sense of solidarity prevents larger members from unilaterally imposing their will on smaller counterparts, who fully benefit from this arrangement. Throughout the history of NATO and the EU, there have been numerous attempts by larger states to enhance their role within these organisations. However, the support of small states holds significant political importance for larger countries. The involvement and contributions of small member states in various operations, sanctions regimes, or other activities lend legitimacy to the policies of larger states and make their decisions more acceptable to the broader international community.

Portugal's Role in Collective Security Arrangements

Portugal boasts one of the largest maritime zones in the Atlantic, making it a committed participant in NATO. Additionally, as a medium-sized European nation, Portugal actively participates in the EU in its aims to develop a unified defence policy that could potentially lead to the establishment of collective defence. These dual commitments are harmoniously addressed in Article 42(7) of the Treaty on European Union (TEU), which affirms the EU's CSDP must respect member states' preference for NATO in framing their collective defence, therefore ensuring compatibility between the EU's defence strategy and NATO's established security policies.

In mainstream Portuguese political discourse, NATO is perceived as the cornerstone of Portuguese national defence. The EU's defence framework is viewed solely through the lens of broader transatlantic defence cooperation. Any calls for European strategic independence that contradict commitments to transatlantic cooperation are therefore dismissed (Severiano Teixeira, 2009).

In the Portuguese 'Strategic Concept of National Defence' (Ferreira-Pereira, 2006). The inclusion of the CSDP is noted for the first time in its 2003 revision. Portugal's commitment to implementing the CSDP is emphasised, with a specific interest in an EU capable of assuming a primary role in resolving conflicts (Portuguese Republic, 2003).

The Portuguese strategic outlook on national defence underscores the belief that the European and Atlantic dimensions are interlinked and integral to the Portuguese national identity. Portugal is characterised as a democracy with European and Atlantic affiliations. Consequently, national interest necessitates enhanced cohesion and solidarity within both the EU and NATO (Portuguese Republic, 2003).

Portugal avoids being pressured into a dilemma between Europe and the United States. This dilemma is circumvented by prioritising NATO obligations over those of the CSDP. This approach aligns with Article 42(2) of the TEU, which mandates unanimity for creating a unified EU defence policy. It also stipulates that the CSDP must honour the commitments of member states whose collective defence is ensured through NATO under the North Atlantic Treaty and must be in harmony with the security and defence policies established within that framework.

The shift of European integration towards foreign and security affairs following the Maastricht Treaty introduced a conflict between the Atlantic and European aspects of Portuguese national interests. This tension became particularly evident during the discussions leading up to Portugal's decision to participate in the Permanent Structured Cooperation (PESCO) for defence and security within the EU in 2017 (Pereira Coutinho, 2024). It was a surprise for many that Portugal did not sign the joint notification to the Council and the High Representative regarding PESCO. On November 13, 2017, twenty- three EU Member States announced their commitment to collaboratively advancing defence capabilities, investing in joint projects, and improving the operational preparedness of their armed forces (Council of the European Union, 2017).

Portugal's unexpected absence from PESCO was influenced by opposition parties collaborating to obstruct the Government's decision. They contended that PESCO represented the initial stage towards establishing a complete European army. Criticisms against PESCO also suggested that it served as a cover for a Germano-French-directed European army that could lead to the fragmentation of Portuguese armed forces through enforced specialisation and might jeopardise Portugal's involvement in NATO (Ferreira- Pereira, 2006).

However, it was soon agreed that the arguments put forth were inconsistent with the principles outlined in the notification to the Council and the High Representative regarding PESCO. Member States acknowledged PESCO as a vital measure for enhancing the CSDP but emphasised that it would only potentially evolve into a European army in an extremely unlikely scenario: a unanimous decision in the Council on adopting a unified defence policy. This implies that PESCO does not mean incompatibility with NATO, which remains the fundamental framework for collective defence among its members (Pedi, 2020). It was made clear that PESCO solely seeks to offer member states avenues for enhancing defence capabilities by engaging in coordinated initiatives and tangible joint projects. As a member state with a lesser military power and lack of the means necessary to defend itself, Portugal quickly realised it needed to participate in PESCO to avoid the risk of losing relevance in European collective defence efforts (Pereira Coutinho, 2024).

The present European defence and security setup offers Portugal the advantage of maintaining its European identity while also leveraging its transatlantic ties as an EU member. However, the emergence of PESCO raises concerns about potential shifts in EU member states' policies towards achieving 'strategic autonomy' from the United States. If, in the future, the United States is reluctant or incapable of providing much of the military protection for Europe, and if member states continue to face the threat of aggression from Russia at their borders, they may be compelled to establish a unified defence policy. In such circumstances, the creation of a European army would become imperative out of necessity. Portugal could then find itself grappling with a significant existential dilemma (Severiano Teixeira, 2010).

Estonia's Role in Collective Security Arrangements

Small members of the EU and NATO, particularly those bordering Russia like Estonia, seek to strengthen security assurances while enhancing deterrence and readiness, urging NATO for greater cooperation and assistance. Estonia's defence policy has unequivocally relied on NATO since joining the Alliance in 2004. The Estonian Ministry of Foreign Affairs emphasises that active NATO membership remains a crucial long-term security priority, enabling Estonia to engage effectively in international security efforts while ensuring its domestic defence (Estonian Ministry of Foreign Affairs, 2023). Alongside its dependence on NATO's collective defence framework, the Estonian Defence Forces uphold a standing army capable of mobilizing around 230,000 reservists and personnel on permanent standby during emergencies (Estonian Defence Forces, 2021). Furthermore, in alignment with NATO objectives, Estonia has consistently maintained defence expenditure at or above 2% of its GDP since 2015 (MacKenzie, 2024).

Upon analysis of the National Security Concept of Estonia, key points concerning Estonia’s perspective on NATO and EU become apparent below (Republic of Estonia, 2023):

NATO	
Forward Defence Posture	Estonia firmly believes in the importance of a forward defence posture to deter potential adversaries. This approach involves a combination of national military defence capability and collective defence through NATO. Estonia sees this as crucial for preventing military threats and, if necessary, successfully defending the country and winning a war.
Deterrence by Denial	Estonia emphasises the concept of deterrence by denial, which forms the basis of NATO's forward defence posture on its Eastern Flank. This strategy aims to convince potential aggressors that achieving their objectives through military means is impossible. Key elements of this strategy include Estonia's strong military defences, a combat-ready Allied presence integrated with Estonian forces, designated reinforcement forces, and effective command and control.
Territorial Defence	Estonia's military defence strategy is structured around the principle of territorial defence. Recognizing the Baltic states as one area of operations, Estonia is focused on developing manoeuvre units and territorial defence units capable of blocking and countering potential adversaries.
Contribution to NATO	Estonia places great importance on its contribution to NATO's collective defence efforts. This includes active participation in NATO operations and exercises, as well as maintaining readiness for rapid deployment of forces in case of a crisis. Estonia values the continuous and planned presence of Allied forces on its territory and supports initiatives to strengthen NATO's defence capabilities.
EU	
Core of Foreign Policy	NATO and the EU are central to Estonia's foreign and security policy. Estonia views these organisations as essential for safeguarding both common and national interests. Close cooperation with NATO and the EU is seen as vital for addressing security challenges effectively. Estonia views the EU as a key actor in promoting regional stability and security. As a NATO member state, Estonia supports efforts to enhance EU defence cooperation and capabilities, complementing NATO's role in collective defence. Estonia seeks to strengthen the EU's role in addressing security challenges, including cybersecurity threats, hybrid warfare tactics, and countering disinformation campaigns
Support for EU Enlargement	Estonia is a strong advocate for EU enlargement and NATO's open-door policy. Estonia believes that expanding these organisations enhances security and stability in Europe. Estonia actively supports countries aspiring to EU and NATO membership, providing assistance and guidance to help them meet accession criteria.
Active Engagement	Estonia actively engages with the EU on various fronts, including crisis management, security cooperation, and decision-making processes.
Support for Ukraine	Estonia stands in solidarity with Ukraine and supports its aspirations for European integration and NATO membership. Estonia provides political, military, and economic support to Ukraine, including assistance in reconstruction efforts, military aid, and humanitarian assistance.

Source: National Security Concept of Estonia, 2023

NATO's ongoing activities in Estonia encompass the deployment of the Enhanced Forward Presence (eFP) battlegroup in Tapa and the Baltic Air Policing missions. The eFP battlegroup, consisting of around 2,200 troops (NATO, 2022a), showcases a visible and active presence in Estonia. Led by the United Kingdom, this multinational battalion remains combat-ready, underlining NATO's commitment to collective defence in the region. (NATO, 2022b).

Furthermore, the Baltic Air Policing missions involve the rotation of different NATO member air forces to carry out air surveillance operations in Estonia, compensating for its own deficiencies in this area. Given the prevailing uncertainty, Estonia has endeavoured to bolster NATO's presence in the region.

Estonia has been the driving force behind the transformation of NATO policy, exemplified by the Baltic Air Policing mission in the Baltic States. Initially conceived as a temporary measure upon its commencement in 2004, Estonia, along with Lithuania and Latvia, expressed dissatisfaction with this arrangement, advocating for a permanent solution. However, during negotiations with other allies, they faced reluctance from major contributors to commit long-term, with some even questioning the necessity of such a mission (Urbelis, 2015).

In response to these challenges, Estonia took proactive measures by spearheading a comprehensive study to explore all potential options, including the procurement of fighter aircraft, to fulfil the air policing mission (Urbelis, 2015). This study meticulously analysed force requirements, basing options, aircraft types, and other relevant parameters.

Ultimately, a study concluded that the current model of air policing, involving the deployment of aircraft to the Baltic States, remained the most effective and cost-efficient approach for the foreseeable future (Urbelis, 2015). These findings, driven by Estonia, were subsequently presented to NATO allies. Discussions with these allies revealed two outstanding issues: a lack of training facilities for incoming aircraft and financial burden-sharing (Urbelis, 2015).

To address these concerns, the Baltic States swiftly allocated an additional 5 million euros annually for host nation support (Reuters, 2014), showcasing small states' proactive leadership. Meanwhile, measures were implemented to tackle the training facility shortage, such as simplifying rules for low-level and night flights and providing opportunities for air-to-ground training and more demanding exercises. Through Estonia's determined efforts, the Baltic States successfully addressed most of the requirements outlined by contributing nations, cementing its position as a proactive leader within NATO.

The sceptics of air policing were left without grounds to challenge the findings of the study. With the support of the US and Denmark, Estonia and its Baltic counterparts successfully convinced other allies that NATO should transition the temporary air policing arrangement into a permanent one (BNS, 2012). This push culminated in the declaration at the Chicago Summit in 2012, which warmly welcomed the decision to prolong the NATO Air Policing Mission in the Baltic states (NATO, 2012). Additionally, the declaration acknowledged the recent commitment made by the Baltic states to bolster their host nation support for the participating Allies, underscoring Estonia's pivotal role in driving this policy change within NATO.

Challenges and Opportunities for Small EU Member States

The previous sections highlight the crucial importance for small countries to actively pursue their priorities. Clearly defined priorities can yield remarkable results, unless they encounter strong opposition from larger allies. Prioritisation remains essential, as small states cannot effectively advocate for their interests on multiple fronts simultaneously. Focusing on a few clear priorities ensures unity of effort and minimizes distractions from less relevant issues. These priorities are shaped by a nation's history, geography, and regional context.

Another strength of small states lies in their ability to specialise in particular areas where they possess unique expertise. Specialisation reflects a country's military-industrial base, historical traditions, and cultural environment. For instance, Estonia's emphasis on cyber issues showcases this specialisation. By concentrating on specific areas, small countries can accumulate expertise and gain recognition and influence within NATO and the EU. The establishment of NATO Centres of Excellence mirrors this geographical specialisation (NATO, 2024).

These specialised areas allow small nations to play significant roles in their respective fields of interest. By hosting centres of excellence, small states maintain important leverage and may even assume leadership roles in shaping NATO policies within their areas of expertise. However, such leadership can only be sustained if additional resources are allocated to maintain a competitive edge over other countries in their specialised fields.

The NATO Cooperative Cyber Defence Centre of Excellence (CCDCOE) was founded in May 2008 at the initiative of Estonia (The NATO Cooperative Cyber Defence Centre of Excellence, n.d.). Shortly after its establishment, the Centre received full accreditation and International Military Organisation status from the North-Atlantic Council in October of the same year. Originating from a concept proposed by Estonia to NATO in 2004, the CCDCOE gained momentum following politically motivated cyber-attacks against Estonia in 2007 (Ottis, 2008), highlighting the growing importance of cybersecurity threats.

Since its inception, the CCDCOE has been actively engaged in promoting cybersecurity through various initiatives. It began hosting cyber security conferences in 2009, including the annual International Conference on Cyber Conflict (CyCon) (International Conference on Cyber Conflict, 2024), which has evolved into a premier event for cyber security professionals worldwide. Moreover, the Centre has organized Locked Shields, the largest international live-fire cyber defence exercise, annually since 2010 (Locked Shields, 2023). This exercise has grown significantly since, simulating complex cyber incidents, and providing a platform for experts to practice strategic decision-making and responses. Another significant achievement of the CCDCOE is the Tallinn Manual process, initiated in 2009 (CCDCOE, 2017). This process involved experts from CCDCOE, legal scholars from various nations, and advisors from nearly 50 states. The resulting publication, 'Tallinn Manual 2.0 on the International Law Applicable to Cyber Operations', released in 2017, provides a comprehensive analysis of how existing international law applies to cyberspace, enhancing understanding and legal frameworks in this domain.

In January 2018, CCDCOE assumed responsibility for identifying and coordinating education and training solutions in cyber defence for all NATO bodies across the Alliance. Active policy formulation, clear prioritisation, and specialisation enable small countries to emerge as influential players in international politics. Through the accumulation of resources and expertise, they can establish themselves as experts and leading nations within NATO and the EU.

The Maritime Geospatial, Meteorological, and Oceanographic Centre of Excellence, located in Lisbon, Portugal, obtained accreditation as NATO's 28th Centre of Excellence in 2021. Currently, it is sponsored by Portugal, Romania, Spain, and Turkey, with Portugal serving as the framework nation. The primary goal of the Centre is to support NATO's transformation efforts in maritime geospatial, meteorological, and oceanographic science, aiming to enhance environmental awareness and operational effectiveness for NATO (NATO, 2024). Its ambition is to become a globally recognized hub of expertise, expanding NATO's capabilities in this domain.

The Centre has embarked on an ambitious Programme of Work in 2023, focusing on Education and Training, Analysis and Lessons Learned, Concept Development and Experimentation, and Doctrine Development and Standards (NATO, 2024). To achieve these objectives, the Centre is enhancing its network of industry and academic experts, with two key events: the Robotic Experimentation and Prototyping augmented by Maritime Unmanned Systems Exercise (REPMUS), and Dynamic Messenger. REPMUS, an annual exercise led by Portugal, provides a platform for large-scale experimentation where NATO navies collaborate with academia and industry to develop and test unmanned capabilities. This exercise promotes interoperability and advances operational concepts and procedures. Dynamic Messenger, NATO's sole operational experimentation exercise, brings together military, industry, and academia to foster innovation and develop capability and interoperability in unmanned maritime systems. The exercise aims to integrate these systems into NATO Task Groups' operations at sea.

The Centre supports both exercises by coordinating Rapid Environmental Assessment Warfare Groups, aiding academia and industry partners in developing new maritime unmanned systems for military environmental assessments. Environmental knowledge plays a critical role in maritime military operations, enhancing information and decision support for commanders and fostering a shared operating picture among Allies (NATO, 2024).

However, advancing integration in security and defence realms presents a myriad of challenges for small EU member states, with their capacity to influence its trajectory remaining constrained. The impact of small states on the EU's security policy is notably limited. As noted by Wivel (2005, 404), a conspicuous trend in recent years is the marginalization of small states from ad hoc decision-making processes and military endeavours within European security dynamics.

Wivel indicates that small states face the dual risk of being left without support, jeopardising their security identities and interests. Throughout history, military collaboration often placed small states in a position where they had to sacrifice participation in decision-making to secure their safety (Goetschel, 2000). Furthermore, the prospect of the EU emerging as an independent security actor was viewed as a potential threat to the security traditions of small states and their associations with the UN and NATO.

Conclusion

In conclusion, this InfoFlash highlights the critical role of small states within NATO and the EU Common Foreign and Security Policy, showcasing their remarkable agency in navigating these complex international organisations. The active pursuit of priorities emerges as a central theme, emphasising the need for small states to vigorously advocate for their interests within NATO and the EU. Clear and persistent strategies are paramount, as they can lead to significant outcomes unless met with strong opposition from larger allies. Prioritisation is crucial, given the limitations small states face in advocating for their interests on multiple fronts simultaneously.

Furthermore, the article underscores the strength of specialisation, highlighting how small states can leverage their unique expertise to accumulate influence within NATO and the EU. Estonia's focus on cyber issues serves as a prime example of this specialisation, allowing small countries to garner recognition and play significant roles in shaping policies. The establishment of NATO Centres of Excellence reflects this specialisation and enables small nations to maintain leadership positions in their areas of expertise.

Additionally, the article emphasises the importance of resource allocation for sustainability, noting that sustained leadership in specialised areas requires additional resources to maintain a competitive edge over other countries. Larger allies often consult with smaller allies before initiating new initiatives, acknowledging their expertise and contributions. Through active policy formulation, clear prioritisation, and specialisation, small states emerge as influential players in international politics, accumulating resources and expertise to establish themselves as experts and leading nations within NATO and the EU. Despite their size, these states prove to be formidable actors in shaping the security landscape of Europe and beyond.

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