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The European Land Force Commanders Organisation

FINABEL - THE EUROPEAN LAND FORCE COMMANDERS ORGANISATION

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Introduction

The necessity for a consistent defence policy has grown more pressing as Europe faces greater security challenges (Hunter, 2024). Considering the increasing security risks, this article analyses the urgent need for a cohesive EU defence policy, exploring new initiatives to strengthen the 2007 EU's Defence Technological and Industrial Base (EDTIB) (European Parliament, 2020). 2022 marked a turning point in EU defence, with the Versailles Summit and the Strategic Compass signalling a shift towards a more integrated approach combining defence and security. This trajectory culminated with the 2024 European Defence Industrial Strategy (EDIS), reflecting a strengthened commitment to a unified approach (Fiott, 2023a) (European Commission, 2024a). Therefore, the article discusses important programmes that encourage interoperability and joint procurement among Member States, with an emphasis on addressing capability gaps. These programs include the EDIS' flagship European Defence Investment Programme (EDIP) and the European Defence Industry Reinforcement through the Common Procurement Act (EDIRPA) (European Commission, 2024b; European Commission, 2023a). These efforts are in line with the 2022 Strategic Compass, which offers more comprehensive direction for EU military strategy in the direction of increased strategic autonomy and interoperability (Council of the European Union, 2022a).

In addition, the article investigates long-standing structural problems with European defence procurement, such as disjointed regulations, lack of industrial capacity and underinvestment, which have impeded the EU's advancement towards strategic autonomy. In light of these limitations, the article evaluates the capacity of European military companies to expand their production to satisfy pressing demands. The article's last section addresses structural issues such as the fragmentation of European defence procurement, which endures despite EU efforts. Industry constraints underline the urgency for collaborative defence planning and sustainable investment (Zandee, 2024). Meanwhile, challenges persist in addressing capability gaps and ensuring effective coordination across the diverse defence strategies of Member States. In spite of structural challenges, recent initiatives signify a notable shift in EU defence policy (Ostanina, 2024). Nevertheless, their success hinges on addressing persistent industrial and political challenges (Wolff, 2024).

1. A New Comprehensive Strategy

The war in Ukraine has highlighted the need to strengthen security and military capabilities, causing a significant change in the EU's defence strategy in recent years (Rutigliano, 2023). The Russian invasion was a watershed for world stability, especially for EU security, as the war exposed weaknesses and spurred attempts to strengthen defence cooperation and increase strategic autonomy among Member States (Howorth, 2023). This shift is reflected in the Strategic Compass, which is the first comprehensive plan to integrate security and defence viewpoints from the EU and its Member States (Council of the European Union, 2022a). Before its adoption, independent communications from the European Commission or research conducted by the European Defence Agency (EDA) have often guided the European defence industry, although a more cohesive and competitive defence industry was demanded at the 2013 European Council's Special Defence Summit (European Council, 2013; Fiott, 2023b).

In this sense, the Compass demonstrates a change in the way the EU establishes its security and military objectives by integrating the defence sector within a broader EU security framework, emphasising the need for interoperability (Council of the European Union, 2022a). However, it does not change the existing governance structure, which keeps defence sector issues under the jurisdiction of the European Commission (Sweeney & Winn, 2022).

Initiatives like the Infrastructure for Resilience, Interconnectivity and Security by Satellite (IRIS²) and 'Galileo' global positioning system to secure satellite communications have strengthened the Commission's role under the direction of former Internal Market Commissioner Thierry Breton (European Commission, 2024c; European Commission, 2024d). These efforts demonstrate the EU's commitment to bolstering its strategic autonomy and guaranteeing interoperability (Fiott, 2022). They also align with broader goals to improve foreign investment screening and secure essential raw resources (European Commission, 2022a; European Commission, 2022b).

Building on previous initiatives, the Compass prioritises interoperability, reduces reliance on the supply chain and achieves technical sovereignty while advocating for substantial expenditures in military capabilities to bridge current capacity gaps (Council of the European Union, 2022a). Even if it points out important areas of attention including soldier systems, air defence, and cyber capabilities, it is still more of a diagnostic tool than a complete answer to the problems facing the EDTIB (Fiott, 2023b). Ultimately, it highlights the ongoing division among Member States and the necessity to coordinate themselves for EU defence policies to align with national security strategies in order for them to be successful (Council of the European Union, 2022a). Coherent defensive efforts are still significantly hampered by this fragmentation, which underscores the necessity of increased cooperation and coordination to improve interoperability (Alcaro & Dijkstra, 2024). The effectiveness of the Compass will ultimately depend on Member States' capacity to coordinate their defence strategies and develop a more integrated strategy that can effectively tackle emerging security challenges through interoperability (Revista Militar, 2022).

2. Advancements in Defence Industry Policy

Since the conclusion of the Cold War, an EU military industrial policy has been progressively developed, making it a comparatively recent development (Howorth, 2019). The adoption of the 2016 European Defence Action Plan (EDAP) and the 2017 Communicaton on Launching the European Defence Fund (EDF) marked an important turning point that boosted EU defence industry strategy (European Commission, 2016; European Commission, 2017). The aim of the EDAP is to enhance defence cooperation, optimise spending and strengthen the EU's defence industry within the 2009 Common Security and Defence Policy (CSDP), a key part of its foreign and security framework (EUR-Lex, 2016a; European Parliament, 2024). In an attempt to counter fragmentation and improve competitiveness, the EDAP seek to strengthen the EU's internal market and encourage investment in military supply chains by more effectively enforcing the laws controlling procurement and the movement of defence-related commodities throughout the EU (EUR-Lex, 2016b).

As part of this effort, the EDAP envisaged the creation of the European Defence Fund (EDF), occurred in 2017. The EDF, which has a budget of over €8 billion for 2021–2027, encourages cross-border collaboration and teamwork between EU public and private organisations, including businesses (particularly small and medium-sized firms), academic institutions and research and technology centres (European Commission, 2017). The regulation seeks to accomplish two main goals: first, it promotes cooperative research that maximises innovation, makes it easier to introduce new defence products and technologies and guarantees the effective use of EU defence research funds; second, it improves the efficiency of EU defence spending by fostering the cooperative development of defence products and technologies, which eventually results in increased standardisation of defence systems and improved interoperability (EUR-Lex, 2021).

In addition, the EU Commission started in October 2023 the EDIRPA project to strengthen this initiative (Fiott, 2023b). Particularly, EDIRPA has a €310 million budget and aims to support collaborative procurement in priority sectors, including ammunition (comprising small arms, artillery rounds, mortars, and rockets), air and missile defence and the replacement of obsolete equipment (European Commission, 2023a). The overall goal of this project is to improve force interoperability among Member States.

Since May 2023, the Act in Support of Ammunition Production (ASAP) has been incorporated into the EDIRPA to address the supply side (European Commission, 2023b). The initiative was established to assist EU countries in replenishing their inventories through targeted efforts. The ASAP will provide €500 million to 31 investment projects that will increase the EU's yearly ammunition production to two million units by 2025 (European Commission, 2023b).

Nevertheless, despite continuous efforts, EU collaborative procurement is still scarce since Member States usually prioritise instant market access and strategies that advantage non-EU suppliers (Macchiarini Crosson & Marrone, 2024). As such, the European Commission introduced the European Defence Industry Strategy (EDIS) in March 2024, presenting a defence industrial policy vision until 2035 (European Commission, 2024a). Strengthening the EDTIB through improved cooperation and higher Member State investments is a top priority of the strategy (European Commission, 2024a). Additionally, it seeks to foster a culture of defence readiness throughout EU programs and increase the resilience and agility of Europe's defence sector (European Commission, 2024a).

As a first immediate and central means to deliver the EDIS, the Commission unveiled the EDIP as a further pillar to bolster European defence (European Commission, 2022b). Leveraging €1.5 billion from the EU budget between 2025 and 2027, EDIP combines financial and regulatory instruments (European Commission, 2024b). By expanding upon the frameworks created by earlier programs, this investment seeks to increase the EDTIB's competitiveness. Specifically, it expands upon the EDIRPA and ASAP principles (European Commission, 2024b). In an attempt to ensure a strong pipeline of innovation to meet future military demands, EDIP also encourages the industrialisation of goods created through collaborative research and development projects supported by the EDF (European Commission, 2024b).

In the past two years, the EU has been promoting its defence industry policy following after the Strategic Compass' priorities, according to the former High Representative of the Union for Foreign Affairs and Security Policy, Joseph Borrell (European Commission, 2024e). In line with more recent efforts, the Strategic Compass indeed stresses the importance of the EDF and promotes joint procurement along with new financing mechanisms, like a VAT waiver and a bonus system for jointly developed capabilities that improve interoperability (Council of the European Union, 2022a). Notwithstanding the advancements, significant obstacles still need to be addressed, including the fragmentation of the EDTIB and the requirement for more efficient integration (Fiott, 2023b). Scholars contend that EU-level incentives to promote military-industry collaboration are necessary to overcome these concerns (Fiott, 2017; Sabatino, 2022). Therefore, how well these fundamental issues are resolved going ahead will determine the effectiveness of the EU's security policy and the development of a strong, unified European military posture.

3. Challenges in Defence Procurement

Addressing military capability gaps and improving collective security are significant difficulties for the EU's defence procurement policy (Besch, 2024). In a communication outlining its contributions to EU security and defence, the Commission concluded that more ambitious investments and streamlined export controls were required, along with enhanced efforts in cyber defence and space (European Commission, 2022d). The European Council had already assigned the Commission the task of assessing the EU's critical military gaps before Russia invaded Ukraine on 24 February 2022 (Council of the European Union, 2021). For example, the Commission's roadmap, presented on 15 February 2022, highlighted dependencies in autonomous systems and semiconductors (European Commission, 2022e).

Learning from the pandemic, the EU acknowledged the need for better-coordinated financing structures considering these inadequacies (European Commission, 2021). At the March 2022 Versailles Summit, EU leaders recognised the pressing need for increased security and military cooperation and the emphasis on collective borrowing and mutual debt for vital areas, such as defence and energy, was reaffirmed (Council of the European Union, 2022b). In this regard, the Summit was a historic moment similar to the 2013 European Council's summit on defence (Fiott, 2023b). The Summit outcome, the Versailles Declaration, acknowledged that "Russia's war of aggression constitutes a tectonic shift in European history" and recognised the importance of reducing energy dependencies and fortifying economic foundations in addition to defence capabilities (European Council, 2022).

To encourage cooperative investments that would improve interoperability among the armed forces of Member States, the Declaration assigned the EU Commission and the EDA the responsibility of evaluating military investment gaps and creating new funding instruments (European Council, 2022). On 18 May 2022, a joint analysis of defence investment gaps was presented, which helped to focus attention on essential requirements such as phasing out outmoded capabilities and restocking ammunition inventories (European Commission & HR/VP, 2022).

A Defence Joint Procurement Task Force was established, and EDIRPA and EDIP were introduced as a result of the analysis's recommendation for combined defence purchase (European Defence Agency, 2022). While EDIP aspires to support significant strategic projects that improve interoperability beyond 2025 (European Commission, 2024a), EDIRPA plans to invest €500 million for joint military equipment purchases between 2023 and 2025 (European Commission, 2023a).

Additionally, the Commission's new approach draws the attention to the importance of coordinating defence planning for long-term joint procurement, supporting maintenance, repair and new capabilities to ensure interoperability (Fiott, 2023b). Shifting from a reactive to an innovative approach in investing in capabilities and promoting interoperability could transform EU security and defence—provided Member States commit to improving defence programming (European Defence Agency & EU Military Staff, 2022). Ultimately, as long as Member States pledge to further collaboration and strategic alignment, adopting a proactive and cooperative approach to defence investment and capabilities development can greatly improve the EU's security and defence position (European Movement International, 2024).

4. Industry Capacity and Structural Issues

Handling the industry's capacity and structural problems is essential to ensuring the long-term efficacy of defence procurement and preserving interoperability (European Parliament, 2020). Despite initiatives to increase cooperative procurement and planning, many European defence firms find it difficult to match government expectations due to the increased demand for military equipment brought on by the full-scale invasion of Ukraine (Ostanina, 2024). Rapid expansions in production capacity have been hindered by the pandemic's impact on commodity prices and the necessity of adjusting supply chains after sanctions (Machi, 2022). The European defence industry must therefore quickly adjust to a wartime economy that accounts for high usage rates of ammunition and off-the-shelf military equipment (Gray, 2024). This would mark a significant shift from the low demand, lengthy development timelines and cost-focused export strategies that have characterised the post-Cold War era (Barigazzi et al., 2024).

It is unsure whether the proposed EDIRPA will greatly increase Europe's defence industrial capabilities. Although more demand and more defined priorities are positive, the industry's fundamental problems necessitate a significant investment of time and money, which cannot be achieved with the limited funding provided by EDIRPA (Fiott, 2023b). Nevertheless, the sector is already adjusting. For example, state-owned businesses like the Romanian ROMARM are investing in new manufacturing methods to deal with growing energy prices (Ilie, 2022) and Rheinmetall has bought Expal Systems to increase the manufacture of artillery ammunition (Katz, 2022). Moreover, it is debatable whether defence-industry cooperation is a viable solution to EDTIB. As demonstrated by earlier joint projects like the Airbus A400M (Airbus, 2023), the TIGER helicopter and the European Multipurpose Frigate or FREMM project (OCCAR, 2014; OCCAR, 2024) — emblems of European defence-industrial alliances — the juste retour concept may result in higher prices (Fiott, 2023b). In addition, the Future Combat Air System (FCAS) represents another significant test balancing between national interests and the requirement for a sovereign European military capability that also prioritises interoperability (Airbus, 2022; Breton & Portier, 2019).

Overall, since Russia's war against Ukraine began, the European defence sector has benefited financially (Mejino Lopez & Wolff, 2024). However, businesses' earnings are still quite low, indicating that export limitations and the size of their home markets constrain their ability to grow (Mejino Lopez & Wolff, 2024). Additionally, European governments have used off-the-shelf technologies to swiftly overcome capability gaps in reaction to Russia's actions (Koenig, et al., 2023). For instance, due to the lack of reliable European options, Germany authorised a deal worth €10 billion for F-35 jets from Lockheed Martin (Siebold & Hansen, 2022), while Poland negotiated a $5.8 billion contract with South Korea for tanks and fighter aircraft (Shin, 2022). With only a small amount designated for European programs like the FCAS, critics doubt that Germany's €100 billion 'special fund' for its armed forces can transform the European military scene (Puglierin, 2024). In the end, Europe's initial reaction to the full-scale invasion of Ukraine might have unintentionally increased its need for outside allies (Simón, 2022). This dependence on ad hoc fixes emphasises how urgently Europe needed a stronger, more unified military strategy as EDIS that places a higher priority on long-term capabilities and greater EDTIB integration to guarantee long-term defence preparedness and strategic autonomy (Fiott, 2023b; European Commission, 2024a).

5. Long-term Outlook and Structural Reorganisation

The European military sector's structural problems and industrial capacity constraints highlight the necessity of thorough and ongoing action (Burilkov & Wolff, 2024). EDIRPA and EDIP are unlikely to meet the priorities of the European defence industry and even the EDF is insufficient to address pressing problems (Barbieux, 2023). Although the conflict in Ukraine has raised demand, it is unlikely that the advantages of the EU's recent defence industrial policy initiatives will be felt very soon because capacity building and structural changes take time (Scazzieri, 2024). As such, they should be seen as part of a longer-term reorganisation of the European defence scene. The envisaged integrated military procurement and planning, however, is controversial among Member States and faces several obstacles in the future, especially concerning the EDIP's financial resources (Fiott, 2023c).

Complicating this further, the Versailles Declaration or the more recent EDIS did not expand upon the community borrowing strategy used during the pandemic, therefore the dispute over common debt issuance is still a crucial issue (Fiott, 2023b; European Commission, 2024a). There are differing opinions on whether the EU should oppose debt centralisation for defence or emulate its epidemic conduct through pooled borrowing (Scazzieri & Tordoir, 2024). Some experts think that the best way to effectively invest in defence is through collective borrowing, while Member States are still debating whether or not national defence expenditures should remain at the national level (Bergmann et al., 2022).

These issues highlight a major obstacle to the achievement of European military policy:

resolving the EDTIB's historical disarray. Overcoming it is crucial as the EU moves into a new strategic phase, allowing for a greater emphasis on interoperability and cooperative procurement (Fiott, 2023b). Despite these hurdles, the Strategic Compass is still a landmark project that has the power to change Europe's security environment despite these financial and structural challenges (Zandee et al., 2021). The ultimate results of the EU defence industry policy, such as the elaboration of the EDIS, or important measures like EDIP and EDIRPA are in line with the Compass' priorities and objectives (European Commission, 2024e), Yet resolving long-standing conflicts within the EDTIB and gaining Member States' support for cooperative investment is essential to its success (Fiott, 2023b). Without coordinated efforts between Member States, the Compass's lofty objectives could remain unattainable, limiting its revolutionary potential to improve European security, notwithstanding the new EDIS (Ungureanu, 2021; Mejino Lopez & Wolff, 2024).

Conclusion

This article has examined the necessity for the EU to establish a coherent and unified military strategy that strengthens its EDTIB. In addition to preserving the EU's strategic autonomy, such a framework is essential for increasing its preparedness to address growing security risks. The full-scale invasion of Ukraine has exposed weaknesses in the EU's defence capabilities but also provided momentum for deeper integration in defence. Recent developments, such as the Strategic Compass and the Versailles Declaration, aim to improve interoperability among Member States, encouraging coordinated efforts and collective security measures to more successfully counter a variety of threats. The elaboration of the 2024 EDIS and programmes such as EDIP and EDIRPA are a clear representation of the EU's commitment to reinforce its defence sector according to the priorities defined by the Compass itself. Notwithstanding the opportunities, the EU still faces significant obstacles in the defence sector, including disparate defence budgets, redundant military assets, reliance on non-EU suppliers and hold-ups in collaborative decision-making.

The EU is at a pivotal moment regarding its military strategy that will shape its security posture for years to come. Its capacity to overcome recurring problems and attain operational efficiency within its defence systems will determine the success of the Compass and related defence efforts. As the globe grows more unstable, the EU's journey towards an independent defence capability shows a larger dedication to upholding its security and strategic objectives. The EU can support regional stability and its strategic objectives while playing a more significant role in global security by continuing to strengthen, simplify and adapt its defence initiatives.

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