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European procurement schemes and the European Defence Fund (EDF): how should academic research develop?

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Review of three books

1. European Defence Decision-making: Dilemmas of Collaborative Arms Procurement, by Calcara A., London: Routledge, 2020.

2. Peace, Security and Defence Cooperation in Post-Brexit Europe Risks and Opportunities, by Baciú C., and Doyle J., New York: Springer, 2019.

3. Defence Industrial Cooperation in the European Union: The State, the Firm and Europe, by Fiott D., London: Routledge, 2019.

ABSTRACT



Because of the recent deterioration of security and stability in the world, disruption of supply chains due to COVID-19, paying attention to national security and defence industries became of supreme importance for the stable development of European defence and security within both the Allied and the European frameworks. This article addresses the current trends in European security cooperation, with a narrower focus on national military-industrial complexes and defence industrial cooperation in the European Union (EU). The article analyses a few academic books on the subject and a wider academic/professional debate in order to illustrate which aspects of coverage are beneficial, which are missing with respect to the objectives of the European Defence Fund (EDF) and which spheres need to be developed further. The primary suggestion is to increase interdisciplinarity and the empirical/military capabilities side of defence research designs. In this way, a more significant impact and participation in policy shaping and capabilities development can be achieved.

KEYWORDS

European Defence Fund (EDF); arms procurement; defence industry collaboration; European security; Defence Technology and Industrial Bases (DTIBs)

Introduction

Since the end of the Cold War, the topic of European security has been widely discussed.¹ The initial hopes for a peace dividend proved futile, while the reorganization of NATO in the 1990s and the dominance of counterinsurgencies and expeditionary warfare in the 2000s distracted attention from strengthening regional security and the significance of national military complexes and defence industries.² However,

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with the revival of peer and near-peer competition and the re-orientation of the United States' attention to the Indo-Pacific area of responsibility, greater attention is being paid to the strengthening of national and regional security and the modernization of the armed forces and military capabilities. Moreover, with deteriorating security and stability in the world and disruptions in supply chains due to COVID-19's immediate and long-term implications, concentrating on national security resources and defence industries has become paramount for the stable development of European defence and security within both the Allied and the European frameworks. The primary purpose of this article is to address the current trends in European security cooperation, with a narrower focus on national military industrial complexes and defence industrial cooperation in the European Union (EU). The article analyses a few academic books on the subject and a wider academic/professional debate to illustrate which aspects of coverage are beneficial, which are missing with respect to the objectives of the European Defence Fund (EDF) and which spheres need to be developed further.

The current security environment in Europe

The current strategic environment in Europe is characterized by the diversification of various threats to security and national defence. Some of these threats are conventional, like intensified terrorist activity, organized crime, the revival of frozen ethnic conflicts and interstate competition over spheres of influence. For example, Russia's constant flexing of its muscles in the aerial domain of various European countries is one example of an enduring threat, which is manifested in a relatively new format of testing Allied air defences and the readiness of their national armed forces (Burke 2020; Fedorchak 2020). Another set of threats is related to relatively new domains of human activities, including various criminal activities and security risks in the cyber environment. The best examples are cyber-attacks on civilian infrastructure like health care and governmental institutions (Caravelli and Jones 2019), ransomware used against businesses, identity thefts, etc. Furthermore, the revival of peer competition has given rise to the issue of spying through diplomatic representations, resulting in the expulsion of Russian diplomats from various countries (Foy 2021).

Looking at the matter from a geopolitical perspective, the shift of American attention from Europe to the Indo-Pacific has triggered various issues for the EU to address in terms of national and regional security (DoD 2018, p. 2–4). First, the question of increased spending on European security has been raised once again. This time the discussion transcends political debates, focusing more on the key strategic spheres that would provide European security in the long run. The main emphasis is placed on the potential of cyber and space domains as the future of defence and security. Second, the current situation both demands and requires the EU to address the opportunities provided by this complex situation, meaning the strengthening of defence and security cooperation within the union. Cooperation within the military industry is only one of the opportunities for stakeholders to approach and implement according to national and regional objectives. Finally, this reorientation suggests the necessity of greater commitments to training

and exercises for the European allies within both the European and the Allied frameworks. The best example is the recent Arctic Challenge Exercise 2021 using the joint aerial assets of the participating countries (NATO 2021).

Furthermore, these trends suggest the need for greater European commitment to research and capabilities development in the field of defence and security. This necessity aligns well with the new 2021–2027 multi-annual financial framework of the EDF, with funding focused on ‘collaborative research in innovative defence products and technologies and for subsequent stages of the development cycle, including the development of prototypes’ (EDA 2021). This fund and framework seek to reduce fragmentation in various weapon systems in Europe, the stimulation of regional cooperation and consequently the improved long-term procurement of capabilities (European Commission 2017, 3).

From the perspective of research and development (R&D), this fund provides exceptional opportunities for civilian institutions, academia, and enterprises to participate in strengthening the national and regional defence and security sphere through practice-oriented and interdisciplinary research. There are plenty of approaches that research projects can take in order to stimulate and guide R&D in the sphere of military industry and capabilities procurement. Some of the academic studies discussed below provide starting points for the systematic and interdisciplinary informing of the EDF’s key stakeholders and beneficiaries. The suggested discussion illustrates the gaps in the current research on the subject of European security and military procurement. These gaps should be addressed in order to inform decision-making, the evolution of the EDF and the projects it should prioritize.

Defence industrial cooperation in the EU

Two authors, Calcara (2020) and Daniel Fiott (2019), have addressed the topic of cooperation in European security with a narrower focus on national military industrial complexes and defence industrial cooperation in the EU. Calcara focuses his research on the four main arms-producing countries in the EU and their participation in European joint armament programmes: the United Kingdom (UK), France, Italy and Germany. He builds the argument that there are two factors that explain the occurrence of both competition and cooperation in European defence procurement: whether the governance of industrial suppliers is public or private and the size of the market. Calcara demonstrates that arms industries can benefit more from national decision-making processes in public governance ecosystems, whereas in private governance, countries are more autonomous and obtain more benefits. The decision making of defence companies and governments is driven by market size contingent to an evaluation of the advantages and disadvantages of the cooperation projects.

Fiott’s book addresses the question of defence industry cooperation in the EU, focusing on the correlations between state and common European levels and exploring the interests and decision making of the three main stakeholders: governments, institutions and commercial entities. The primary argument is that despite the popular opinion that common policies result in the loss of national governmental control over various policies, intergovernmental bargaining in the field of defence and security aims to reassert control over national Defence Technology and Industrial Bases (DTIBs). Hence, cooperation is

viewed as a way of preventing geopolitics and globalization from changing and even challenging the traditional ties that exist between national governments and commercial companies. The author argues that the development of defence-oriented EU policies and the establishment of new common institutions are aimed not at relinquishing national competencies to the new common institutions, but at providing national governments with new functional frameworks to affirm national control over national defence markets. The author sets a goal of identifying the grey area between integration and cooperation in the defence and security sector.

Although both books discuss similar aspects, Calcara focuses more on the perspectives of industries in each of the four countries, and he illustrates in more detail versatile national dynamics of interests and the diversity of lobbying strategies used by various stakeholders. On the other hand, Fiott follows a more traditional approach of exploring governmental, commercial and institutional perspectives of lobbying and decision making, focusing on the establishment of the European Defence Agency and the adoption of defence transfer and defence procurement directives. Although practical examples are used in his book, the focus is nevertheless more on the overall European level rather than on national dynamics, as in Calcara's research. Besides showing various features of national defence industries and the consequent interests of the stakeholders, Calcara pays due attention to specific joint programmes in aerial capabilities, such as NH90, the Eurofighter and Airbus A400M. All three projects are discussed from the national perspectives of the four chosen countries and the interests of commercial and governmental stakeholders.

From the theoretical perspective, both works aim to test certain theories and provide practical evidence to stimulate wider conceptual debates. Calcara looks into the perspectives of traditional international relations (IR) theories in combination with international political economy (IPE) and comparative politics. He makes the case more in favour of IPE than traditional IR theories as theoretical frameworks that can explain stakeholders' behaviour. The author is convincing in his analysis. However, focusing more on neorealist perspectives may provide additional insights into the rationale of states behaviour. Nevertheless, the focus on testing theoretical frameworks is constant throughout his work. Fiott adopts a more pragmatic and spear-headed approach to theory. He aims not only at applying Moravcsik's liberal intergovernmentalism, but also critiques the key principles of the theory and its applicability to the field of defence and security policy within the current dynamics. Comparing the two works from the theoretical perspective, Fiott's work is more focused on the traditional approach of adopting and testing the theory of European integration. It can be considered a textbook example of this procedure and how best to stimulate further theoretical debates. On the other hand, Calcara explores various theories and hypotheses through empirical case studies that take into account the individuality and distinctiveness of national contexts and the rationale for decision making. Hence, the two books provide various theories applicable to exploring the chosen subject of defence and security policies and industries. Overall, both books effectively deliver what they promise, with different focal points and attention to the interests of the varied stakeholders. Both books provide a good balance of linking theory to practice and showcasing the extent of European cooperation in the defence field. The two are not in competition; rather, they would complement each other in academic discussions and on readings lists for university courses on European studies, international

relations and security studies. I am sure that both works will inspire further student and academic research projects to build upon these authors' research designs and findings. From the perspective of EDF and practice-oriented research, Calcara's book provides more empirical data and case studies for the identification of key gaps in capabilities development and consequent solutions for improving R&D and future procurement in the EU.

On the other hand, as a specialist in strategic and security studies, I deem both works lacking in more military and strategic considerations. From political and economic perspectives, both books do an excellent job in fulfilling their purposes. However, they illustrate only part of the overall picture – the political and economic considerations – without paying due attention to the military and strategic aspects and the consequent lobbying of various national policies and priorities in decision making. I am referring not so much to the evaluation of the strategic environment and threats assessment but more to the exploration of what armed forces have to say in procurement schemes and the national commercial lobbying of various projects and policies. Including this perspective into the authors' analyses would make the research more systematic and illustrate another dimension to the described situation.

For instance, if the costs of infrastructure, support and logistics of some projects were evaluated during a certain time, it would be possible to gain a more realistic picture of the effectiveness of the national and joint European programmes as well as their likelihood of future development. Adding this angle to the analysis would attract the attention of military practitioners who are more practice-oriented. In other words, in order to bridge the gap in civil-military understanding and between strategic studies and IPE, both sides should be represented in the research if not equally then at least partially.

Looking at the security and strategic studies perspective, various attempts have been made to address the commercial and procurement side of contemporary warfare, with a focus on the distinctive domains of warfare or national procurement traditions. As I specialize in air warfare, it is easier for me to use examples from this domain. For example, Trevor Taylor (2018) has discussed the implications of the costs of combat aircraft on procurement and the sustainment of current and future capabilities. Burgess and Antill (2016) have edited a volume on new strategies for defence acquisitions and military procurement, focusing on the Allied discourse and discussing the potential of public-private partnerships (PPPs). An excellent illustration of a balanced approach between civil and military considerations is the work by Butler (2017) on Transatlantic Defence Procurement, in which the author compares EU and United States defence procurement regulations. Once again, his work is not a purely strategic evaluation of the subject, but more of a balanced comparison of the legal/normative and security procedures of procurement.

Hence, both books provide an excellent exploration of the topic of European defence cooperation from the perspective of various stakeholders within the political-economic spectrum and a detailed theoretical framework for European integration with regard to security and defence policies. They certainly manage to address some inconsistencies between IPE and security-related topics in European studies and international relations. However, in order to bridge the gap with strategic studies, both works would need to include military perspectives, the practicalities of military procurements and the rationale for national armed forces' lobbying for distinctive capabilities.

The impact of Brexit on European security

Over the past five years, Brexit has been one of the most widely discussed topics in both academic and political circles. Uncertainty regarding the process, negotiations and implications of Brexit has worried many stakeholders across the world. Consequently, a multitude of perspectives and very niche topics have been explored in the light of Brexit. The field of security and defence studies is not an exception. In general, the totality of current and future literature on the subject can be divided into pre-Brexit expectations and forecasts on the one hand and actual consequences for regional and global security on the other. Although literature on actual implications is yet to see the light of day, existing academic works primarily address the potential effects of Brexit on security. This body of academic research covers various aspects (Hill 2019; Johnson and Matlary 2018; Zyla 2020). Despite the variety of academic works on the subject, multiple sides still require more detailed analysis and the inclusion of national perspectives and expertise.

The book edited by Baciú and Doyle (2019) focuses on assessing the security environment post-Brexit. It was written at a time when there was little clarity about the outcome of the negotiations and how the actual process would be finalized. Hence, it provides numerous perspectives on various interests and potential case scenarios for the development of cooperation post-Brexit as well as some solutions regarding how security challenges could be handled under the condition of complex negotiations during and after Brexit.

The book is divided into four parts. First, the collaborative potential of EU-UK relations is discussed in terms of British-French cooperation and the challenges of channel security. Both theoretical and practical dimensions are covered. In the second part, the post-Brexit future of European security is discussed in terms of the strengthening of French-German cooperation alongside some generally under-represented national cases like the Northern Ireland peace process and Estonian perspectives on the subject. The third part looks into sources of legitimation and power in the future European security landscape, addressing technological, naval and nuclear aspects. Finally, the fourth part considers conceptualization of the future European Security.

Overall, the book provides sufficient coverage of the above-mentioned topics, with systematic, in-depth analysis of the data available at the time of writing. Hence, the book is a good source for a comparative analysis of expectations and assessments of Brexit and the post-Brexit reality. However, with a few exceptions, the book covers rather traditional subjects like UK-French cooperation and the strengthening of French-German collaboration post-Brexit. Although these are important topics to address, the book's novelty and originality are to be found in its chapters on Northern Ireland and the strengthening of British-Estonian relations after the Brexit referendum, corresponding to the argument of the commonality of threats and threats assessment in post-Brexit Europe.

As more of a strategic studies expert, I believe that the book lacks a realistic threats assessment of the security environment in post-Brexit Europe. It can be argued that predicting threats is challenging. However, the majority of European and global national security policies illustrate that some threats remain unchanged due to constant geopolitical significance of various countries. This may also indicate the strengthening of British-

Estonian collaboration, as the common threat remains the same. Consequently, the necessity of military and security collaboration is still essential, if not through the EU framework than through the Alliance.

It is also worth mentioning that despite the dominance of negative sentiments on both sides regarding Brexit, the security concerns and geopolitical correlations among states remain the same. Moreover, international relations are based on bilateral agreements. In the sphere of national and regional security, common interests prevail despite Brexit. Hence, the book provides an excellent illustration of the political discourse of the time and makes some relevant conceptual claims as to the future of European security.

From the perspective of the research potential discussed within the EDF, more attention could have been paid to the empirical side of collaboration among various states, addressing military interoperability and different interests in capabilities development and procurement.

Conclusion

Overall, these research trends illustrate that traditional European studies approaches to the topics of security and defence – meaning attention to the multitude of stakeholders, diversity of interests, political discourses and case study specifics – are only partially covering the growing necessity in defence industry research for the EDF's R&D demands. Hence, more attention should be paid to the empirical side of systematic analysis of military industries and their responses to the risks and threats posed by the current strategic environment. The primary suggestion for academic projects to inform R&D in accordance with the objectives of the EDF is to increase interdisciplinarity and the empirical/military capabilities side of defence research designs. In this way, greater impact and participation in policy shaping and capabilities development can be achieved.

Note

1. <https://www.ntnu.edu/employees/viktoriya.fedorchak>
2. <https://viktoriyafedorchakphd.wordpress.com/>

Disclosure statement

No potential conflict of interest was reported by the author(s).

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