WHAT FUTURE EUROPEAN DEFENCE AND TECHNOLOGICAL INDUSTRIAL BASIS (EDTIB) DO WE WANT/NEED?

The Swedish case

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Armament Industry European Research Group

The Armament Industry European Research Group (Ares Group) was created in 2016 by The French Institute for International and Strategic Affairs (IRIS), who coordinates the Group. The aim of the Ares Group, a high-level network of security and defence specialists across Europe, is to provide a forum to the European armament community, bringing together top defence industrial policy specialists, to encourage fresh strategic thinking in the field, develop innovative policy proposals and conduct studies for public and private actors.

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ABSTRACT

This ARES commentary delves into Sweden's stance on European Union (EU) defence-industrial initiatives. The paper provides a comprehensive analysis of Sweden's defence industry, tracing its history, which significantly shapes its approach to EU defence initiatives. The paper then assesses the impact of the Russian invasion of Ukraine on Sweden's defence policy and budget, leading to increased defence spending and a shift in focus towards national defence. The impending NATO membership, augmented defence budget, and long-term defence planning are expected to influence Sweden's approach to EU defence policy. Focusing on EU defence initiatives, the commentary scrutinises Sweden's position in negotiations on the European Defence Fund (EDF), EDIRPA and ASAP as well as its position within the EU Strategic Compass process. The paper outlines Sweden's overall lukewarm reception of the new EU defence initiatives, marked by scepticism towards EU ambitions of consolidating the defence market, on the role of the European Commission in defence policy and a consistent emphasis on the importance of competition. The commentary concludes by outlining challenges and future outlooks, highlighting potential risks of Sweden prioritising NATO integration over EU initiatives. It also explores the broader trend of member states pushing back against the Commission’s new EU defence initiatives and examines how Sweden's budget-restrictive perspective may impact its political ambitions regarding emerging defence-industrial initiatives coming out of Brussels.

Keywords: Swedish defence | EDTIB | European Defence Fund (EDF) | Sweden

Sweden is currently in the process of breaking with its 200-year history of neutrality and military non-alignment by applying for NATO membership in response to Russia's full-scale and illegal invasion of Ukraine in 2022. The forthcoming Swedish NATO membership is, however, also creating implications on the Swedish stance on the security and defence policy role for the European Union (EU) ahead. Nevertheless, the Swedish government has also recently outlined how the EU has got a more important security policy role as well (Swedish Government 2024). And the ongoing Swedish Defence Commission notes that:

The EU is Sweden's most important foreign policy arena. In the new security policy environment, the EU's importance for Sweden has increased, while its central role in the transatlantic community has been solidified and the value of the EU's security policy tools made clear. (Swedish Defence Commission 2023)

In that regard, this ARES commentary aims to outline Sweden's view on the European Defence and Technological Industrial Basis (EDTIB) as well as on the most recent EU defence-industrial initiatives. Overall, Sweden could, however, be seen as adopting a Janus-faced approach to the development of EU security and defence policy. The Swedish political establishment has often expressed the ambition to be at the core of the Union's Common Security and Defence Policy (CSDP), while concurrently maintaining a degree of scepticism or lukewarm reception towards the new EU defence-industrial initiatives launched in recent years (c.f. Fägersten, Danielson and Håkansson 2018). This stance is influenced by various factors, including historical considerations, its transatlantic outlook, and structural considerations.

This paper proceeds as follows: The next section provides crucial background information on the Swedish defence industrial setup, which is essential for understanding Sweden's stance on the EDTIB. The paper then briefly discusses how the Russian war on Ukraine has impacted Swedish defence and its defence spending. Subsequently, the following section outlines Sweden's position on the most recent EU initiatives and discusses its overarching ambition in relation to these developments. The final section then concludes and looks ahead.

BACKGROUND: AN OVERVIEW OF THE SWEDISH DEFENCE INDUSTRY AND ITS SETUP

To comprehend the Swedish stance on the various new EU defence-industrial instruments, it is essential to delve into its history, as well as its political, economic, and cultural ties with the defence industries of the UK and the US. Sweden's defence industry is both large and sophisticated for a country of its size, primarily due to its history of neutrality and military non-alignment, which, in turn, necessitated a strategy of self-sufficiency. Following the Second World War, in which Sweden had not been involved, the country developed a considerable defence industry, producing specialised equipment such as fighter jets, submarines, artillery, missiles, and advanced radar equipment, among other capabilities (Lundmark 2019).

In the late 1990s, the Swedish defence industry underwent a process of privatisation, leading to the abolition of state ownership and the introduction of foreign ownership in significant parts of the industry. Since then, the Swedish government has pursued a market-liberal policy. Furthermore, the reduction in defence budgets following the Cold War resulted in the high internationalisation of the Swedish industry, with a substantial reliance on exports (Lundmark 2019). All significant factors influencing the Swedish stance on EU defence-industrial initiatives today, as will be elaborated on below. Or as explained by Lundmark (2022: 411): "In a European comparison Sweden was uniquely market-liberal. The state had decided that these companies would and should be able to survive without state ownership, possibly under foreign ownership. Furthermore, strong incentives were created to make Sweden engage more in international arms collaboration".

Since the end of the Cold War, the Swedish defence industry has in that regard also become more integrated into the international defence-industrial market and no longer maintains the same level of self-sufficiency as before. Thus, today it can now be characterised as a 'smaller, niche-oriented, technologically advanced defence industrial base' (Lundmark 2022: 401). In this regard, it also currently depends on, among others, US and other foreign equipment – for instance US made engines for the Gripen fighter jets – in its nationally produced defence products. Overall, the Swedish market is dominated by the privately owned SAAB, which holds a significant share, and manufactures fighter jets, submarines, advanced radar and communication systems, ATGMs, portable SAMs, ammunition, among other capabilities.

However, other major players include for instance the British BAE Systems, which owns both BAE Hägglunds and BAE Bofors.

Overall, Sweden's highly market-liberal approach, aligned with a view and defence-industrial strategy similar to that of the UK, coupled with its privatised industry heavily dependent on international exports, has significantly influenced its stance on the EU defence initiatives, aiming at it to be as open as possible. Furthermore, its financial, cultural, and political ties with the UK and US have played a substantial role in shaping Sweden's approach to EDTIB. In this context, third-country participation has been a crucial aspect for both the government and the industry in advocating during negotiations on EU defence initiatives, including the European Defence Fund, PESCO, EDIRPA, and ASAP (Calcara and Simón 2021; Fägersten, Danielson, and Håkansson 2018; Olsson 2019).

THE UKRAINE WAR AND THE IMPACT ON SWEDISH DEFENCE

One of the reasons behind Sweden's market-liberal defence industrial approach, as elaborated above, has been the decline in the national defence budget after the end of the Cold War. However, since the first Russian invasion of Ukraine in 2014, Sweden's defence budget has increased, and the defence doctrine has once again shifted focus towards national and territorial defence after a period focused on international missions and operations. The most significant shift occurred after the full-scale Russian invasion of Ukraine in 2022, prompting a swift political decision to seek membership in NATO alongside Finland. While Sweden's applications have been delayed by Turkey and Hungary, the Swedish Armed Forces and the Government offices are in the process of aligning its defence policy with NATO's.

The full-scale Russian invasion of Ukraine has also led, with cross-party support, to an increase in the Swedish defence budget, reaching the NATO 2% target in 2024. This marks a significant and steady rise from around 1.4% in 2021 (Ekonomistyrningsverket 2022; Swedish Government 2023a). Moreover, the Swedish procurement agency, the Swedish Defence Materiel Administration (FMV), has made a historical increase in orders due to replacement acquisitions, reflecting its commitment and support to Ukraine and heightened ambitions aligned with the existing total defence bill (FMV 2024). In 2024, the Swedish Defence

Commission (the Swedish Defence White Book) will also present its long-term planning for the Swedish defence between 2025 and 2030. Hence, the impending Swedish NATO membership, the augmented defence budget, and the upcoming long-term defence planning could impact Sweden's approach to EU defence policy.

TACKING STOCK OF THE NEW EU DEFENCE INITIATIVES: A SWEDISH VIEW

This section begins with an examination of Sweden's stance within the European Defence Fund (EDF) negotiations, as it serves as a crucial backdrop for understanding the Swedish position on new initiatives such as EDIRPA and ASAP. During the EDF negotiations, Sweden adopted a firm approach, emphasising that 'strict third-party conditions would discriminate against or shut out its national industry and restrict Swedish cooperation with non-EU member states' (Lundborg Regnér and Håkansson 2021). Therefore, the relative success of Sweden in opening up the EDF (as well as PESCO) was perceived as an important step. Nevertheless, issues connected to IPR (intellectual property rights), Swedish defence export controls as well as national planning processes at first created some difficulties for Swedish companies in the EDF (Lundborg Regnér and Håkansson 2021; Olsson, Dalberg and Junerfält 2022). In their study of the Swedish view on the EDF, Olsson, Dalberg and Junerfält (2022: 74) overall assess that the Fund 'comes with considerable opportunities [for the Swedish industry] but also certain challenges' (…) including 'the costs of participation, the added administration involved in third-party ownership, SME-specific difficulties, and the risks associated with consolidation'. The outlined Commission goal within the EDF of consolidation and integration of the European defence market has been met with overall resistance from Sweden (Calcara and Simón 2021).

In 2022, the Swedish Government also received findings from an investigation concerning a military defence equipment supply strategy (SOU 2022). The inquiry highlighted various factors specific to Sweden that require attention, particularly the potential hindrance of European cooperation due to Sweden's stringent export controls. In this regard, other countries might be concerned that Sweden's stricter export controls could lead to difficulties

in exporting jointly produced equipment. Moreover, the inquiry states that the national Swedish process, in terms of defence planning, funding and armament acquisitions, is not aligned with the European process. It also suggests that the Swedish Government should establish a specific goal for what it aims to achieve through Swedish involvement in EU defence-related cooperation. To enhance participation in EU projects, it is recommended that Sweden improves coordination and collaboration between the government and the industry (SOU 2022). Some of these aspects have started to be addressed, including improved coordination between industry and the government and somewhat enhanced internal processes on EU defence initiatives within government offices. Overall, Sweden's participation in the EDF could also be viewed as quite successful, aligning well with the size of its defence industry (see, for example, Lundberg 2023; Masson 2024).

However, since the full-scale Russian invasion of Ukraine, the EU's defence policy has steadily increased with new initiatives, along with significant utilization of the European Peace Facility (EFP) in support of Ukraine. Furthermore, at the time the war started, the EU was in its final phase of adopting its new *Strategic Compass*, which also placed increased emphasis on the defence-industrial aspects. Sweden actively participated in the *Strategic Compass* process, while also expressing reservations against some ideas, including the identification of different flagship industrial projects in the Compass (Interview with Senior Swedish officials, Brussels 2022). However, the war in Ukraine has altered Sweden's once lukewarm or hesitant stance on the EPF, as it now regards it as a crucial tool in supporting Ukraine (c.f. Håkansson 2021).

The negotiations on the EDIRPA and ASAP initiatives largely took place under the Swedish EU presidency in the spring of 2023, which implied a more neutral approach from the Swedish negotiators in line with the role of an honest broker (*Euractive* 2023a). Nevertheless, Sweden could overall be seen as supporting the member states pushing back against the Commission's plans to prioritise order or providing details about the manufacturing capabilities of the industries (*Euractive* 2023b). Moreover, in the Swedish Parliament, the Defence Committee initially expressed concerns over the EDIRPA proposal, arguing that it is 'not compatible with the principle of subsidiarity, since these matters are primarily national competences.' Additionally, the Committee contended that the Commission should not be 'given greater influence over decisions regarding defence policy that were previously taken at a national

level, as this could result in the intended objectives not being achieved' (Swedish Parliament 2022). Similarly, the Swedish Government early voiced its concerns over the proposal, stating that it overall supported the ambition but identified several weaknesses related to information security, the role of the European Commission, and the overall subsidiarity of the proposal. The government emphasised that 'unnecessary fragmentation of the defence industry should be avoided, while acknowledging that diversification for both defence-industrial and military-operational reasons, in certain cases, may be both necessary and desirable. The European defence industrial base should be built on competition, and any consolidation should continue to occur on market-oriented grounds and conditions' (Swedish Government 2022). Nevertheless, after some adjustments to the final proposals and in line with its role as an honest broker during its EU presidency, the EDIRPA proposal could be adopted under the Swedish presidency in the summer of 2023 (Council of the EU 2023a; Scarazzato 2023).

In terms of the ASAP proposal, the Swedish Government outlined its overall support for the proposal, especially in line with the ambition of supporting Ukraine. Yet, it stressed that: “the proposal from the Commission contains problematic formulations regarding the parts that concern granting the Commission extensive powers to gather information, map and monitor the production capacity of the relevant industry, as well as the ability to prioritise orders and impose fines on the concerned industry. The government believes that it is important for the European defence industrial base to fundamentally be based on competition”. (Swedish Government 2023b)

In that regard, Sweden positioned itself in the large camp of member states pushing back against some of the Commission proposals. Nevertheless, the Council negotiation mandate could be agreed upon during the Swedish EU presidency and soon be concurred with the European Parliament under the Spanish Presidency, in line with the urgent need to adopt the proposal to support Ukraine (Clapp 2023a; Council of the European Union 2023b).

Overall, Sweden could thus be perceived as lukewarm regarding the new EU defence toolbox. Since the EDF negotiations, the Swedish side has also consistently 'rejected supranationalism in defense procurement' (Calcara and Simón 2021: 882). It has maintained a high level of scepticism towards the ambitions of consolidating the European defence market and

consistently underlined the need for competition in the market. The Swedish Security and Defence Industry Association has also actively participated in the Commission's consultation process towards the European Defence Industrial Strategy (EDIS). In this engagement, it has expressed overall support and emphasised that the strategy should encourage EU member states to prioritise European-made defence equipment. However, it also highlights the importance that the 'EDIS does not jeopardise relations with the United States and the United Kingdom.' It further asserts that 'Strategically, it is not desirable for all Member States to use identical defence systems. Diversity in equipment, systems, and supply chains contributes to the agility and effectiveness of the industry and armed forces' (SOFF 2024). The Swedish Government has likewise teamed-up with the other big defence-industrial players in Europe – France, Germany, and Italy – pushing back against some of the new Commission proposals and underlining that 'prerogatives of Member States have to be regarded' (*Politico* 2023a).

Nevertheless, the increased importance of the European Union in defence matters, coupled with the loss of the UK as a close ally in the Union, has prompted Sweden to adopt a somewhat more ambitious stance on EU defence matters (Coetzee and Berndtsson 2023; Håkansson 2021). In this context, the Swedish Government has recently signed a project agreement with the ammunition manufacturer Nammo, alongside the Finnish and Norwegian states, to co-finance and support an initiative within ASAP (*SVT* 2024). Furthermore, the CEO of the Swedish defence giant SAAB has recently emphasised, echoing the findings of an ARES study on the impact of the Ukraine war on the European defence market, that more than 70% of the orders should not go to the US industry. He argued in that regard that European states need to place a greater number of orders with European industry instead (Maulny 2023; *Politico* 2023b).

CHALLENGES AHEAD AND FUTURE OUTLOOKS

Thus, overall, we can expect that Sweden will continue with its traditional approach to EU defence industrial initiatives. In that regard, Sweden wishes to see a European Defence and Technological Industrial Base driven by competition and openness to significant partners, including the US and the UK. Additionally, Sweden will continue to express reservations about the growing supranationalisation of defence policy at the European level. Moreover, while in the national context, Swedish actors emphasise the need to be forward-leaning and make new decisions on Swedish defence policy, there seems to be a business-as-usual approach to EU defence policy. This underscores a sceptical outlook on more common planning and envisions a more limited role for EU institutions in the future. Another risk is that Sweden will focus its overall efforts on NATO integration and may not allocate financial resources, political capital, as well as personnel to the important new EU initiatives.

Overall, what we have observed during the negotiations on the EDIRPA and ASAP is that member states push back against the new EU defence tools and the role of the Commission. Schnitzler (2023, 4–5), for instance, notes that member states considerably eased the initial criteria put forward by the Commission in their negotiation stances on EDIRPA (see also Clapp 2023b). This aligns with recent studies by Hoeffler (2023) and Håkansson (2024), indicating that member states have watered down prior defence initiatives suggested by the Commission. In that regard, it will be important to see how the member states react and engage with the upcoming European Defence Investment Programme (EDIP) as well as the new European Defence Industrial Strategy (EDIS).

Finally, Sweden aligns itself with the budget-restrictive (or frugal) camp of member states within the European Union, which could potentially impact its political ambitions regarding the new defence industrial initiatives emanating from Brussels.

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