



ROMANIA'S PERCEPTION OF THE EU DEFENCE INDUSTRIAL "TOOLBOX"

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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

Over time, the European Union (EU) could gradually become a major player in the EDTIB, the European Defence Technological and Industrial Base. In recent years, it has developed several initiatives to support defence industrial cooperation between Member States and their defence companies¹. For European capitals, this represents a major paradigm shift. How do they see this new role that the EU, and the Commission in particular, are in the process of acquiring? What is their perception of the EU's toolbox for supporting the EDTIB?

To answer these questions, the Ares Group has launched a series of seven papers (comments) on as many European countries. Here, Dr. Simona R. Soare analyses the case of Romania. The paper finds Romanian participation in EU defence projects is modest so far, but comparable to other countries in Central and Eastern Europe, which suggests poor representation is not merely a national challenge but rather a regional one. Structural problems in Romania's defence industrial ecosystem are discussed in the paper, too.

While recent developments suggest Romania is interested to better position itself to better leverage the EU defence toolbox, Romanian authorities remain sceptical of the European narrative on strategic autonomy which could splinter the transatlantic alliance. Furthermore, while Romania participates in common procurement initiatives, Bucharest has previously defended its sovereign right to procure military equipment as a sovereign decision. This is likely to continue, not least because most Romanian military capabilities are procured from its closest strategic partner and ally, the US. At the same time, viable defence industrial cooperation with a host of European partners and allies is increasingly available and advisable, which is where the added value of the EU defence toolbox lies.

Keywords: Romania | EU | Defence Industry | EDTIB | EU Industrial Toolbox

¹ These initiatives are in addition to those carried out under the framework of the European Defence Agency (EDA), and include, among others, the European Defence Fund (EDF), the Permanent Structured Cooperation (PESCO), the European Peace Facility (EPF), the European Defence Industry Reinforcement through common Procurement Act (EDIRPA), the Act in Support of Ammunition Production (ASAP), the European Defence Industrial Strategy (EDIS) and the future European Defence Industrial Programme (EDIP).

Romania perceives the new EU defence industrial toolbox as a key opportunity to modernise its domestic defence industry through an infusion of capital; access to knowhow and transfer of emerging technologies; the facilitation of greater cooperation with key allies; and the incentivisation of national defence research. Romanian support for the EU defence toolbox, which seeks to enhance the competitiveness of the European Defence and Technological Industrial Base (EDTIB) and contribute to sustainable military capabilities across Europe, has been consistent, albeit discrete. Romanian public declarations of support for new EU defence programmes including the European Defence Industry Reinforcement through common Procurement Act (EDIRPA), the European Defence Industrial Program (EDIP), and the Act in Support of Ammunition Production (ASAP) are rare and seldom made in relation to clear national defence priorities (Lupițu, 2023; HotNews, 2023).

The *2020-2024 Romanian National Defence Strategy (2020)* emphasises the importance of complying with NATO requirements. Romanian defence procurement prioritises plugging key capability gaps, replacing obsolete Soviet-era military platforms, modernising its military capabilities and enhancing interoperability with NATO allies primarily through foreign military procurement. EU defence policies take a backseat in Romanian defence priorities. The EU's strategic autonomy agenda, as well as EU defence toolbox, are often regarded with scepticism in Bucharest, who fears it may lead to weaker transatlantic relations and undermining of NATO (Soare, 2017). Indeed, Romanian authorities appear equally concerned with the possibility that the EU's narrative on strategic autonomy in defence, as well as with the European Commission's growing role in regulating the defence industrial sector, might produce ruptures in the relationship with the US. Thus, deepening EU defence cooperation is often presented in Romanian strategic documents as a way to pursue greater NATO-EU cooperation, coordination and synergy (Presidential Administration, 2020).

Bucharest's participation in projects funded under the EU's defence toolbox has been modest so far. PESCO is the clear priority for Romania among the EU defence initiatives (Ministry of National Defence, 2023a). Nevertheless, Romanian authorities have signalled a potential change of strategic direction following the Russian war of aggression against Ukraine and the hostilities in the Middle East. In October 2023, the country's Supreme Council of National Defence, Romania's main defence decision-making body, emphasised the development of a sovereign defence industrial base including by leveraging EU defence toolbox and NATO instruments (Presidential Administration, 2023). This does not necessarily imply a move away from Romania's established tradition of foreign (often non-EU) military procurement, but rather a complementary set of actions.

Romania is still on a learning curve in terms of leveraging EU defence toolbox instruments to their fullest potential and more closely aligning them to national defence planning and

spending for optimal results. For the past five years the Romanian authorities have undertaken efforts to expand their defence cooperation networks across Europe, and beyond, to improve their competitiveness in future EU defence programme bids. However, the results are slow to emerge and will require further consolidation over the course of the next decade to better align national defence requirements and priorities with EU defence programmes.

ALIGNMENT OF NATIONAL AND EUROPEAN DEFENCE POLICIES

Assessing the synergy between Romania's defence industrial priorities and the new EU defence industrial toolbox is challenging. First, Romania does not have a specific national defence industrial strategy.² Romania's *2020-2024 National Defence Strategy*, the country's programmatic document in defence matters, only briefly notes the need to reinvigorate the national defence industry as a precondition of meeting national commitments in NATO. EU multiannual defence tools are considered an opportunity to relaunch and modernise Romania's national defence industry through an infusion of much-needed funding, deeper defence-industrial cooperation with allies, and access to knowhow around emerging technologies. The document lists accessing European R&D funding opportunities, awarding governmental investments in the domestic defence industry and increasing the competitiveness of the Romanian defence research sector as the last three of twenty-three lines of action in national defence (Presidential Administration, 2023).

Following three decades of underinvestment in its domestic defence industry, Romania's national defence decision-making body, the Supreme Council of National Defence (CSAT), recently signalled a possible change of direction. On October 12, 2023, the CSAT adopted the military procurement plan for 2024-2033 (*Planul de înzestrare a Armatei Române pentru perioada 2024 – 2033*). The document more prominently features the need to retain a functional sovereign defence industrial capability for national defence and ensure it has the modern technology to design, build and maintain Romania's military capabilities (Supreme Council of National Defence, 2023). The EU's upcoming Defence Industrial Strategy as well as NATO's new Defence Production Action Plan will have positively influenced Romanian strategic thinking in this regard. Therefore, the Romanian authorities' early signals of interest in developing the national defence industry could be interpreted as an attempt to align with European and allied strategic thinking and as an attempt by Bucharest to better position itself to compete more successfully for available EU funding.

² An attempt to develop a national defence industrial strategy in 2010 failed adoption in Parliament and since the effort was not renewed.

These developments appear in line with reported efforts by the Ministries of Defence, Economy³ and Foreign Affairs over the past five years to expand Romanian defence cooperation networks and embed national research and development institutions and defence companies deeper into European and global defence supply chains. Recent examples are the Romanian defence cooperation agreements with Sweden, Poland, South Korea, and India (Ministry of National Defence, 2023a), as well as the investment agreements with the US, Israel, Switzerland, Germany and France (Ministry of National Defence, 2022; Ministry of National Defence, 2023a). They are also testimony to Romania's hedging efforts between the rising opportunity presented by the EU defence toolbox and strong non-European partnerships, such as the strategic partnership with the US and the historical collaboration with Israel, two of the largest investors in the Romanian defence industry.

The Ministry of Economy recently adopted the country's *National Industrial Strategy 2023-2027* which partially covers the defence industry. The document, which is significantly shaped by the EU's updated Industrial Strategy, identifies the very high level of dependency on exports within the Romanian digital and defence industrial sectors and analyses the risks associated with ongoing geopolitical and geoeconomics trends on Romanian industrial interests. Despite the mentioning of all EU defence toolbox instruments, and in contradiction to the narrative by the Ministry of National Defence and the Supreme Council of National Defence, the industrial strategy's priorities do not appear to immediately prioritise the defence industrial sector (Ministry of Economy, 2023a).

Romania's procurement priorities under the current and previous military procurement plans (Ministry of National Defence, 2023b) are consistent with the EU's Capability Development Priorities announced in late 2023 (European Defence Agency, 2023). However, further work is needed to better align Romania's multi-annual defence planning, such as the military procurement plan, with EU processes such as CARD, PESCO and EDIRPA. Significant legal framework adjustments were required over the past decade to enable the Ministry of Defence and units subordinated to it to engage in multi-annual projects (Parliament of Romania, 2022), lead multinational defence capability consortia or receive external funds from EU defence programmes.

Moreover, Romania has previously and consistently defended its sovereign right to procure defence capabilities based on its strategic needs (i.e., close partnership with the US) despite EU defence procurement directives. Moreover, Romanian authorities remain sceptical of EU narratives of strategic autonomy in defence, which are perceived as damaging the strategic transatlantic relationship and NATO. The fact that Romania participates in several joint

³ In Romania, the Ministry of Economy holds primary legal authority and policy responsibility over the domestic defence industry.

procurement projects in NATO, including most recently the *Defence Production Action Plan* for ammunition endorsed at the Vilnius Summit, makes Bucharest alignment to the EU joint defence procurement initiatives challenging in the medium term.

Nevertheless, expanding Romania's participation within EU defence programmes is a stated priority for the Romanian Ministry of National Defence (Ministry of National Defence, 2023a). This Romanian interest in EU project is primarily driven by access to EU funding which can complement national-level expenditure and by the need to diversify the defence industrial sector through foreign partnerships. In this context, the Romanian authorities regularly emphasise the need for coherence and non-duplication between the different instruments of the EU defence industrial toolbox and NATO initiatives. Indeed, deepening NATO-EU cooperation features as one of the key defence activities under the *2020-2024 National Defence Strategy* (Presidential Administration, 2020).

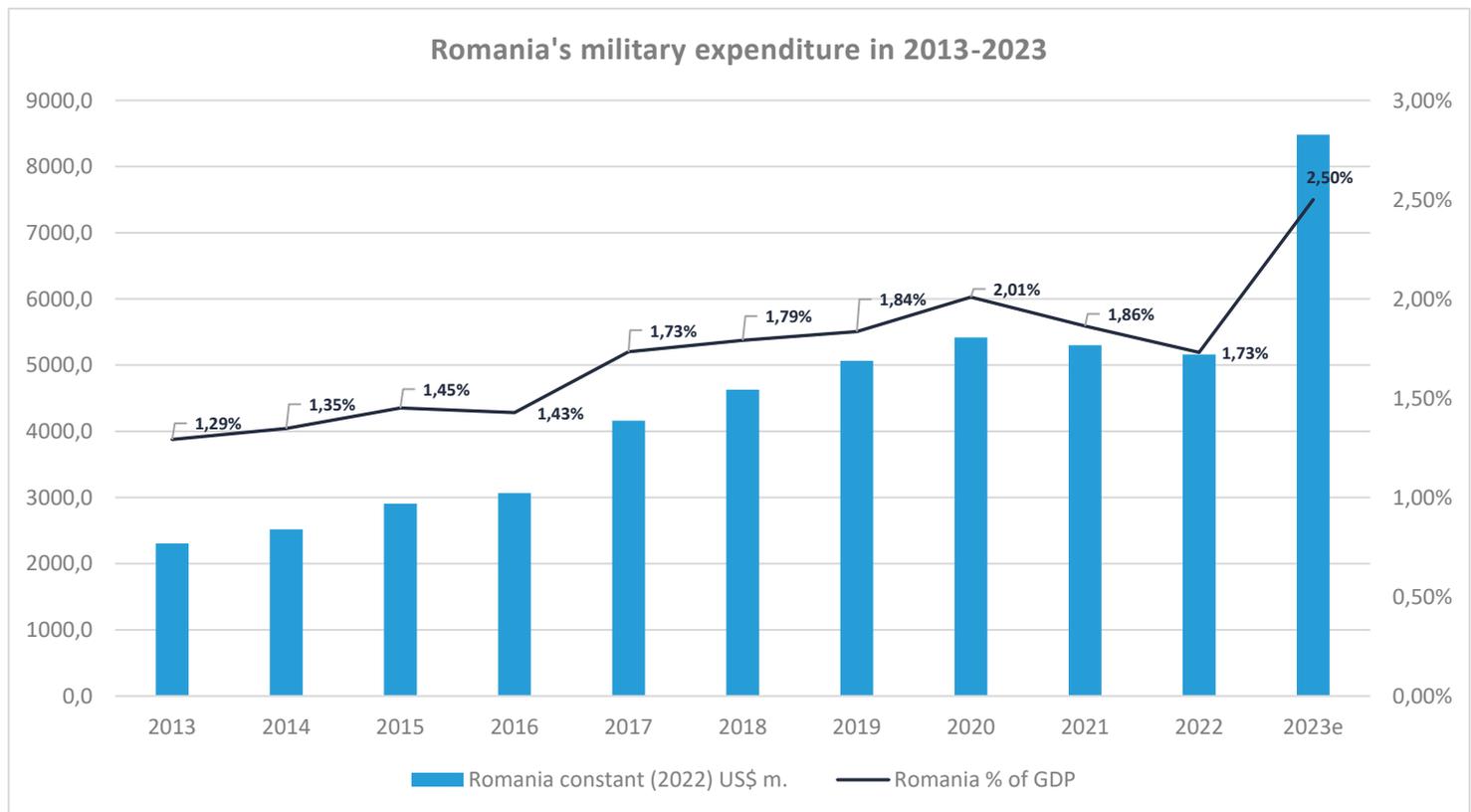
The commitment to meet key Permanent Structured Cooperation (PESCO) pledges is prominent in the *2020-2024 National Defence Strategy*, including the allocation of 2% of GDP to defence, of 20% of annual defence expenditure to defence investment and of 2% to defence research and development (Presidential Administration, 2020). Official Ministry of National Defence documents suggest Romania is steadily meeting its promises under PESCO (Ministry of National Defence, 2023a). In 2015, Romanian political parties reached a national agreement to increase to and maintain the Romanian annual defence expenditure at 2% for a decade (Romanian Presidential Administration, 2015). In 2022, following the second Russian invasion of Ukraine, the Romanian government announced national defence spending will reach 2.5% of GDP from 2023 onwards (*Figure 1*) to enable the modernisation of the force, comply with NATO and EU commitments and modernise the defence industry.

However, this stands in contradiction to Romanian investment in the domestic defence industrial base and defence research and development. Official figures by the Ministry of Economy certify the modest Romanian investment in the modernisation of the state-owned defence industrial sector over the last decade (Ministry of Economy, 2023b). ROMARM reported receiving some EUR 161 million in national investment funding between 2018 and 2023 (Cornea, 2023). Even at the small scale of the Romanian defence industrial base which is mostly state-owned, it receives approximately EUR 80 million in annual national funding (Cornea, 2023), this level of investment is insufficient to meet the double challenge of modernisation and increase of production capacity.

Moreover, the Romanian defence budget does not specifically include a category for research and development and such expenses are included in other budgetary categories. The actual defence R&D investment is quite challenging to estimate and there appear to be discrepancies

between national Romanian MoD annual budgets and figures held by the EDA.⁴ Nevertheless, a partial assessment of Romanian planned expenditure on defence research and development in 2023 suggests an investment of approximately 0.54% of the annual defence expenditure in fundamental research. Though only a partial estimate, this is in line with independent assessments of Romania’s investment in research, development and innovation more broadly, which suggests Romania’s is the smallest R&D investment across the EU (KPMG, 2022). Contrary to popular perceptions that the country has not benefited from EU membership in defence industrial terms, the budget of the Ministry of National Defence suggests Romania has consistently received more non-refundable grants and loans through various EU programmes, including EU defence programmes such as the PADR, EDIDP, EDF and others than it has allocated from national budgets (Ministry of National Defence, 2023c).

Figure 1. Romania’s military expenditure in 2013-2023 (constant 2022 US\$)



Source: Ministry of National Defence, 2013-2023.

⁴ The author would like to thank Lucie Beraud-Sudreau for pointing out the potential discrepancy between official and reported figures.

ROMANIAN DEFENCE INDUSTRIAL LANDSCAPE

The Romanian defence industrial ecosystem struggles with an enduring lack of competitiveness following three decades of underinvestment, obsolescent technology and production facilities, shortage of skills and raw materials. As a result, the Romanian defence industrial sector still faces critical challenges in establishing reliable long-term European partnerships and attracting foreign and European investment.⁵ This has been a significant obstacle to deepening Romania's participation in EU defence industrial programmes.

Despite the lack of transparency around the funding received by Romanian actors, the Romanian authorities have been able to access EU defence programmes. For example, the annual budgets of Romania's national state-owned defence company, ROMARM significantly varied year-on-year, often because of external orders rather than domestic demand.⁶ This has happened despite steady annual Romanian national defence expenditure increases over the last decade (*Figure 1*). Most recently, in 2022 exports to Ukraine represented 93.3% of ROMARM's total revenue (ROMARM, 2023). Romania could access funding through the European Peace Facility for military aid to its war-ravaged neighbour country. Israel and the US are the largest recipients of Romanian military industrial output, followed by some margin by France, Switzerland and Italy (Ministry of Foreign Affairs, 2023).

Unlike leading European countries which procure internally an important ratio of their national defence industrial output – and are therefore interested in leveraging EU defence programmes for this purpose as well – Romania continues to procure the vast majority of its military equipment externally. Indeed, Romania reportedly procures only 5% of the defence industrial output of its state-owned defence company, ROMARM (Popescu, 2019). According to Romanian defence industrial sources, the current output only amounts to 40% of the national defence industrial production capacity and the most of it is exported (Cornea, 2023), as discussed above. Meanwhile, Romania procures externally most of its military equipment, primarily from the United States, France, Israel, Switzerland, Italy and Turkey (SIPRI, 2023). In particular, key components of Romania's military modernisation over the past decade, which have ensured interoperability with NATO and European allies, were procured externally (Mihăltianu, 2023).⁷ Ongoing procurement tenders announced by the Ministry of National

⁵ This state-of-play has been further amplified by a contraction of demand for defence capabilities across Europe over the past three decades, which resulted in the contraction of industrial and production capacity and investment opportunities.

⁶ See ROMARM's financial reports for the period 2013-2023 at <https://romarm.ro/informatii-publice-romarm/bilanturi-contabile-2/>, Retrieved October 17, 2023.

⁷ The list of foreign military equipment Romania procured since the mid-2010s includes the US-produced second-hand F-16 *Fighting Falco* multirole fighters acquired from Portugal and Norway, the US-produced air-to-air missiles AIM-120 *AMRAAM* and AIM-9X *Sidewinder* as well as SHORAD/VSHORAD missiles, the US-produced *HIMARS* system, the US-produced *PATRIOT* missile-defence system, and a US-produced coastal air-defence system. Ongoing procurement tenders announced by the Romanian Ministry of National Defence are likely to follow a similar path, most notably Romania's announced intention to

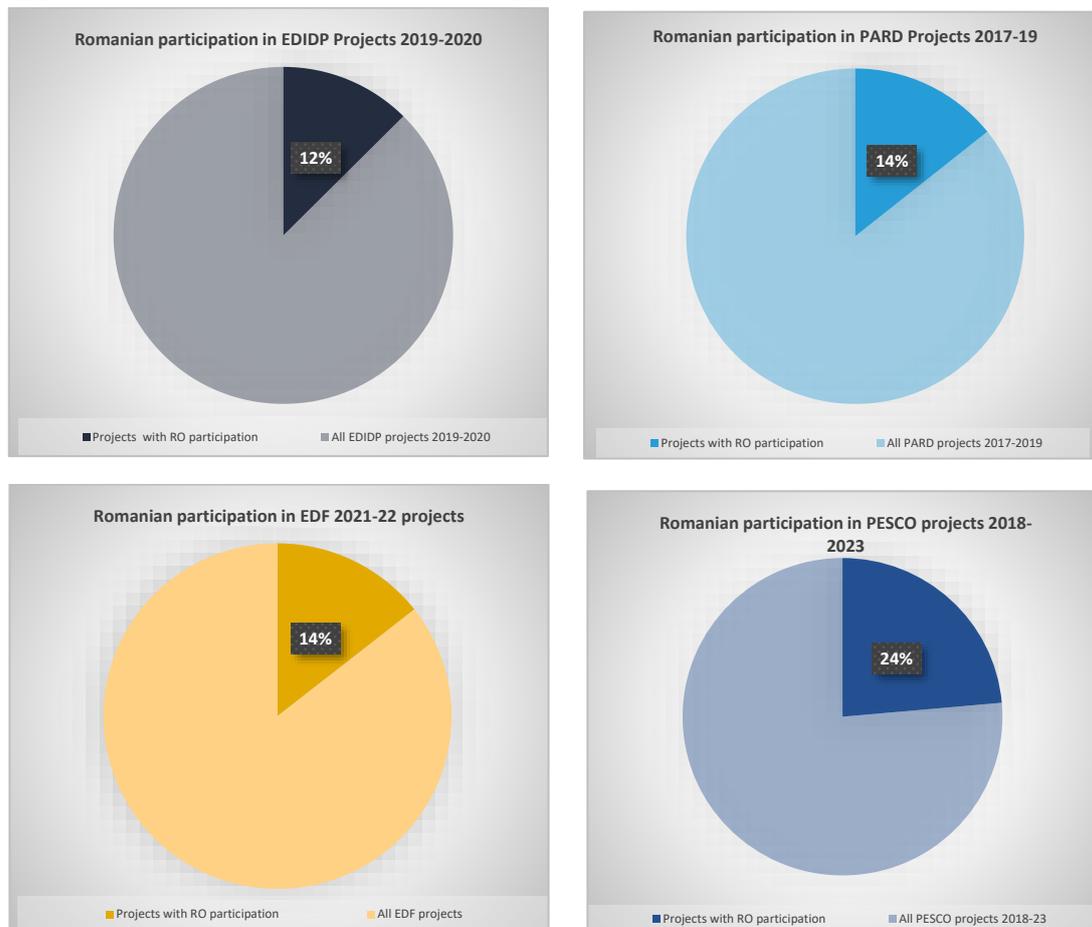
Defence under the most recent National Defence Procurement Plan, which allocates approximately EUR 40 billion for defence investment by 2033 (Mihălțianu, 2023), are likely to follow a similar path.

The country's defence industrial ecosystem requires an urgent infusion of cash, technology and knowhow. It also requires investment in developing a sustainable sovereign supply chain for strategic requirements and capability needs, such as ammunition. While Romania's national defence company ROMARM could technically produce 155mm artillery which are required under the EU's ASAP programme in which Romania participates, there are no defence companies in the country which produce gun powders and other key components (Bolocan, 2023).

Such structural problems along with defence planning misalignments, skills shortages, legislation gaps, and budgetary limitations are obstacles to greater Romanian participation in EU defence programmes. As a result, Romania's participation in PADR, EDIDP, EDF projects and ASAP submissions has been modest (see *Figure 2*), though Bucharest has submitted a significant number of applications. Under the EDF 2021 and 2022 calls, Romanian companies submitted 16 and 18 applications respectively, of which 10 and 7 were successfully funded in the two respective rounds (Ministry of National Defence, 2023a). Similarly, Romania participates in 20 EDA capability projects, of which six are research and technology projects (Ministry of National Defence, 2023a). Romania's participation in EU defence projects is comparable to that of other central and Eastern European countries (Masson, 2023), which suggests this is a regional challenge not just a national one. Romanian success rates in EU defence bids may be deceiving, though. Romanian institutions bid as part of larger consortia; in the vast majority of successful bids only one Romanian institution is represented and allocated small budgets for its participation.

procure the F-35 *Lightning II* multirole fighter, the Abrams M1A2 main battle tank, and most recently the Turkish-produced *Bayraktar* drones.

Figure 2. Romanian participation in EU defence initiatives



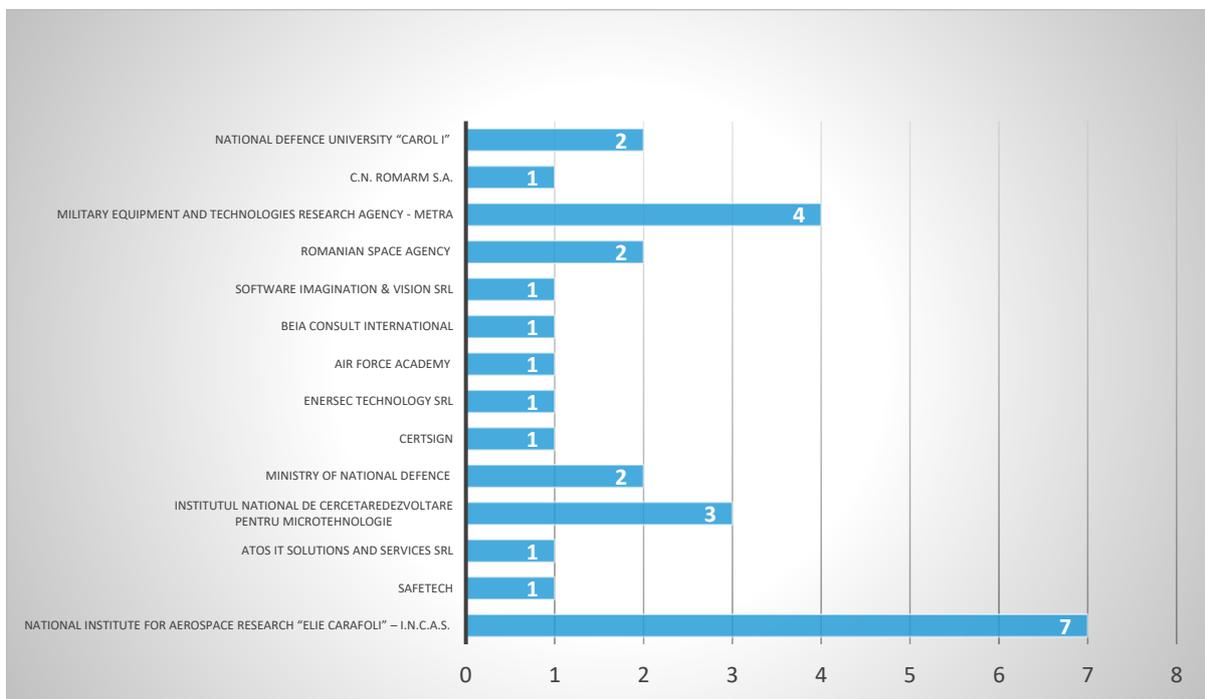
Source: EDA, 2023 and European Commission, 2023

Furthermore, Romania’s ability to lead European defence consortia and integrate into such large-scale European consortia in EU defence programmes, remains limited. This is demonstrated by the fact that unlike other Central and Eastern European countries, Romania only leads two PESCO projects and no EDF, PADR or EDIDP projects. This is particularly important for state-owned defence industrial actors, such as ROMARM. For example, ROMARM has reportedly only participated in one funded EDIDP project, despite participating in EU tenders worth EUR 250 million (Cornea, 2023) and all its few research and development projects are funded domestically (ROMARM, 2023). On average, fewer Romanian entities participate in large EU defence projects (one entity per project), compared to other central and eastern European countries like Poland, Hungary or Slovenia or southern countries like Greece. This is a consequence of Romania’s skeletal defence industrial and defence R&D ecosystem.

The limited number of Romanian defence industrial actors actively involved in EU defence projects could explain at least in part the limited interest Romanian authorities have taken in

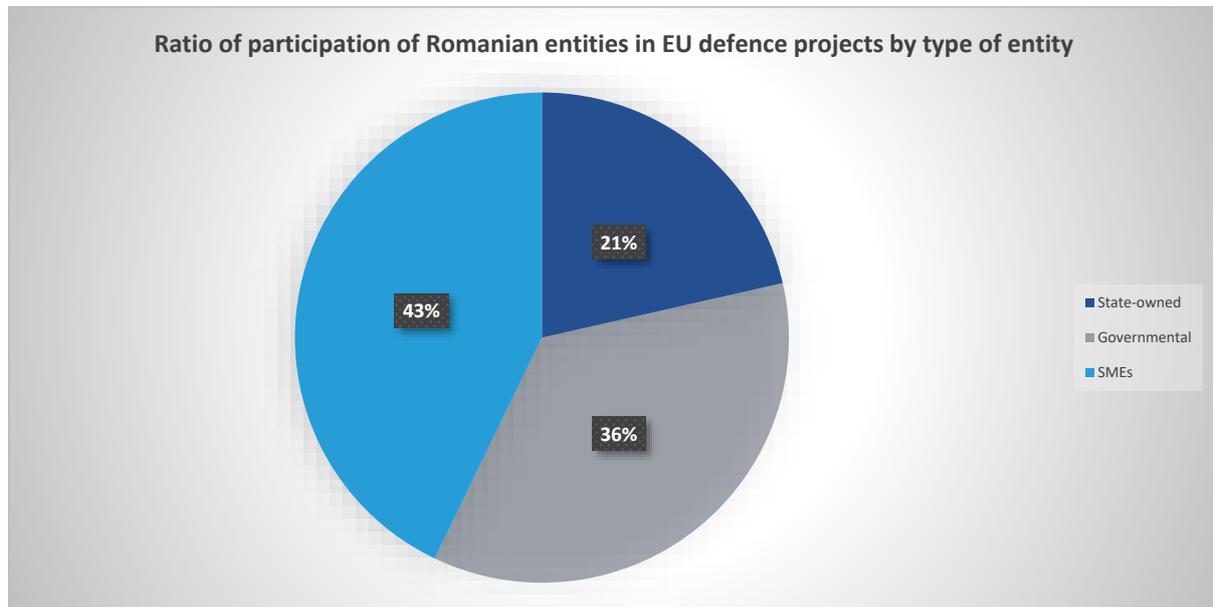
expanding their participation and engagement in such programmes. Moreover, despite Romanian authorities having emphasised the expansion of the domestic private defence industrial ecosystem, most Romanian entities participating in EU defence projects are governmental agencies and state-owned facilities, and to a lesser extent private sector actors (*Figures 3 and 4*). Furthermore, the lack of capacity to lead large PESCO and EDF projects as well as lack of political will to support the development of the sovereign defence industry explain this puzzling state-of-affairs.

Figure 3. List of Romanian entities participating in EU defence projects (PADR, EDIDP, EDF) 2017-2022



Source: European Commission, 2023

Figure 4. Ratio of participation of Romanian entities in EU defence projects (PADR, EDIDP, EDF) by type of entity (2017-2023)



Source: European Commission, 2023

CONCLUSION

Bucharest is not well placed to substantially leverage the EU defence toolbox in the short and medium terms. This influences negatively the views of Romanian entities and authorities in relation to the immediate utility of these programmes. This is true even if Romanian authorities are driven by financial considerations, knowledge and technology transfers in the context of their participation in EU defence projects. While the government’s industrial strategy as well as a renewed interest in the sovereign defence industrial capability are welcome steps in the right direction, the structural weaknesses in the national defence industrial sector are challenging to overcome.

Several aspects require urgent governmental action at scale. These include sustainable and sufficient governmental and private investment, an amplification of the government’s efforts to embed Romania in EU-wide defence research and development networks, and a scaling-up of efforts to attract foreign investment and establish joint ventures which localise production of military capabilities, modernise production lines and ensure specialised training.

Other structural challenges, such as gaps in the defence industrial ecosystem, a still nimble private defence and defence-digital industrial sector, a shortage of defence industrial skills

and modern production facilities, modest private investment, and low investment in defence R&D will continue to be important obstacles for Romania.

Finally, Romania's propensity to procure predominantly off-the-shelf foreign military solutions will continue the dependency of the sovereign defence industrial sector on access to export markets and its vulnerability to shocks across global defence supply chains for raw materials and energy. However, one could argue that while the development of the defence industry is an important strategic objective, an even more important short-term objective for Bucharest is to retain access to reliable, modern military capability for territorial defence and contributions to collective defence and EU missions and operations. Diplomatic and security efforts to facilitate private investment and maintain access to export markets for Romanian defence products will need to be exponentially and urgently increased in a time of great geopolitical instability and uncertainty. The importance of such efforts cannot be overstated, as recently demonstrated by the Romanian attempt to compete for the ASAP call which depended on reaching a strategic agreement with a German investor.⁸

Considering the Russian threat to the East, better leveraging the EU defence toolbox holds great potential for Romania to develop its defence industry, to access cutting-edge technological development, to enhance interoperability and cooperation with allies and partners thereby enhancing its security overall.

However, there are inherent strategic limitations and structural challenges for Bucharest to overcome. Romania greatly values and prioritises its strategic partnership with the US; Bucharest will wish to continue to procure military capabilities from the US as a measure of strategic reassurance and assured interoperability despite the existence of European alternatives – even though the latter might be cheaper and available through common procurement. At the same time, viable defence industrial cooperation with a host of European partners and allies is increasingly available and advisable, which is where the added value of the EU defence toolbox lies.

⁸ The Romanian submission to the 2023 ASAP call for projects was reportedly (Romanian Government transcript of press conference, 2023) underpinned by a negotiated agreement with Germany. Following the first Romanian order to Rheinmetall in a EUR 328 million contract for the modernisation of the Romanian air defence system, Germany was reported to co-finance the refurbishment and modernisation a state-owned Romanian ammunition factory which would produce NATO-standard shells compatible with European military aid to Ukraine. For example, in January 2023 *The Wall Street Journal* reported the following quoting German and Romanian official sources: "Germany will co-finance the refurbishment and expansion of a Soviet-era factory in Romania to produce both NATO-standard shells and types compatible with Soviet-standard weapons used by Ukraine, according to German and Romanian officials. The project, which hasn't been previously reported, could be unveiled by the end of this month." The Romanian-German co-investment agreement was never made public since this reporting and the name of the Romanian factory to be modernised in the joint venture was never made public; therefore, we cannot assess whether it underpins the Romanian project submission to ASAP or not.

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