Europe du Nord – exemples de dynamique de coopération régionale

Nordic defence cooperation

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Agenda

- Focus on Nordic countries (Denmark, Finland, Norway, Sweden)
  - Similarities and differences
- Defence industry
- Different sorts of collaboration
- Links to Baltic region
- Drivers of collaboration
- Links to NATO-EU-EDA
- Links to the US
### Defence export & import

#### Sum 2009-2018 million USD

<table>
<thead>
<tr>
<th></th>
<th>Export</th>
<th>Import</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>209</td>
<td>722</td>
<td>0,29</td>
</tr>
<tr>
<td>Finland</td>
<td>625</td>
<td>1383</td>
<td>0,45</td>
</tr>
<tr>
<td>Norway</td>
<td>1525</td>
<td>2753</td>
<td>0,55</td>
</tr>
<tr>
<td>Sweden</td>
<td>3622</td>
<td>745</td>
<td>4,86</td>
</tr>
</tbody>
</table>

#### Ratio export/import

- Denmark: 0,29
- Finland: 0,45
- Norway: 0,55
- Sweden: 4,86
## Defence industry

<table>
<thead>
<tr>
<th>Company</th>
<th>Nation</th>
<th>Defense News Top 100</th>
<th>Turnover million USD</th>
<th>Employees</th>
<th>% defence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saab</td>
<td>Sweden</td>
<td>32</td>
<td>3 090</td>
<td>16 400</td>
<td>84</td>
</tr>
<tr>
<td>Kongsberg</td>
<td>Norway</td>
<td>81</td>
<td>771</td>
<td>6 800</td>
<td>44</td>
</tr>
<tr>
<td>Patria</td>
<td>Finland</td>
<td>90</td>
<td>486</td>
<td>2 800</td>
<td>92</td>
</tr>
<tr>
<td>Nammo</td>
<td>Norway</td>
<td>95</td>
<td>432</td>
<td>300</td>
<td>80</td>
</tr>
<tr>
<td>BAE Systems</td>
<td>Sweden</td>
<td>-</td>
<td>400</td>
<td>700</td>
<td>90</td>
</tr>
<tr>
<td>Hägglunds</td>
<td>Sweden</td>
<td>-</td>
<td>160</td>
<td>300</td>
<td>100</td>
</tr>
<tr>
<td>BAE Systems</td>
<td>Sweden</td>
<td>-</td>
<td>60</td>
<td>200</td>
<td>n/a</td>
</tr>
<tr>
<td>Bofors</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eurenco</td>
<td>Sweden/Finnland</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
State, foreign and cross-ownership in defence industry

- The Norwegian state owns 63.2 % of Kongsberg
- The Finnish state owns 49.9 % of Patria
- No state ownership in Sweden or Denmark

- Kongsberg owns 50.1 % of the shares in Patria
- Kongsberg owns Nammo, which has facilities in Norway, Finland and Sweden
- BAE Systems owns Hägglunds and Bofors (Sweden)
- Eurenco is owned by SNPE (part of Giat/NEXTER), and has facilities in Finland and Sweden
Russia’s impact on the Nordic/Baltic context

• Altered threat assessment after Georgia 2008 and Ukraine 2014
• NATO and the US more prioritised partner
• More collaboration:
  • Exercises
  • Interoperability
  • Cross-border operational integration
Nordefco – Nordic Defence Cooperation

- Denmark, Finland, Norway and Sweden
- Host nation support important issue
- Limited defence materiel cooperation
  - Nordic combat uniform
  - Ammunition
  - Several working groups for agreeing on standards (eg. data link) – in order to be able to share information and data
- Discussions on logistics and security of supply
Baltic Sea collaboration

- Operational
- Regional collaboration under NATO conditions
- Bilateral agreements
- Nordic-Baltic is developed
- Nordic-Germany/Poland not so developed
National priorities

- Military readiness
- Logistics
- Security of supply
- Accessible capabilities
- Bilateral agreements
Importance of EU and EDA?

- Limited for military readiness and capabilities
- Denmark not active in EDA
- Ex-Warzaw pact nations (Poland, Estonia Latvia, Lithuania) strongly prioritise NATO over EU and are also more receptive to NATO’s goal of defence budget 2.0 % of GDP
- Commission has strong impact on market and acquisition decisions and regulations
  - BUT, member states can avoid this by declaring ‘vital security interests’
Challenges for Nordic defence-industrial collaboration

- State ownership vs. market oriented
- Strong state influence and control in Denmark, Finland and Norway – less so in Sweden
- Denmark, Finland and Norway strongly offset-driven – not Sweden
- Export-import conditions and global competitiveness
- System level of products
- Relation to NATO and US
Relation to the US?

- Denmark strongly responsive to NATO
- Sweden has strong link with US in technology and certain capabilities
- Denmark and Norway NATO members, Finland and Sweden not (but close)
- Sweden chose Patriot in 2018 over SAMP/T
Merci de votre attention!