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# EUROMIL SURVEY – THE FUTURE OF EUROPEAN DEFENCE



**EUROMIL** aisbl  
European Organisation of Military Associations  
and Trade Unions  
Boulevard du Roi Albert II, 5, B1  
B - 1210 Brussels  
Tel: +32 480 660933  
policy@euromil.org  
www.euromil.org

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# INTRODUCTION

EUROMIL decided to conduct an internal survey on the future of European Defence given the adoption of the Strategic Compass. The geostrategic environment is changing rapidly, new threats are emerging and international cooperation is key in addressing these changes. EU Member States are moving towards further integration in the Security and Defence sector with the Strategic Compass being a guiding document for the next five years.

Russia's aggression in Ukraine, hybrid threats and climate change require closer defence cooperation among states worldwide. To provide a few examples, the EU has realized that it needs to accelerate its security and defence capacities, to be able to act quickly and independently when a crisis occurs, and also with partners when possible. Besides, EU Member States are increasing their national defence budgets, as Germany, and neutral states are considering further participation to CSDP, as Denmark.

To continue, the Strategic Compass is based on four pillars: 1. To Act, 2. To Secure, 3. To Invest, 4. To Partner. Under the first pillar, the document entails the creation of a Rapid Deployment Capacity consisting of 5000 troops and taking part in rescuing, stabilization and evacuation operations, while the Permanent Structured Cooperation (PESCO), the European Defence Fund (EDF) and the European Peace Facility (EPF) remain important tools for the further development of the defence sector and the promotion of enhanced cooperation between the Member States.

Cooperation with partners represents also a key part of the document; EU and NATO aim to enhance their dialogue in various domains, from military capabilities and addressing hybrid and cyber threats, to climate change and gender equality. Climate Change has become an important pillar in the defence sector, and congruent with the Strategic Compass, the objectives of the EU Green Deal will also apply to CSDP missions and operations and to the overall defence sector. To that extent, defence industry has an essential role to play, while it has to become more sustainable and adapt to climate change. It is important to consider that defence industry may face restrictions, especially concerning access to funds, under the taxonomy regulation if it does not become "greener".

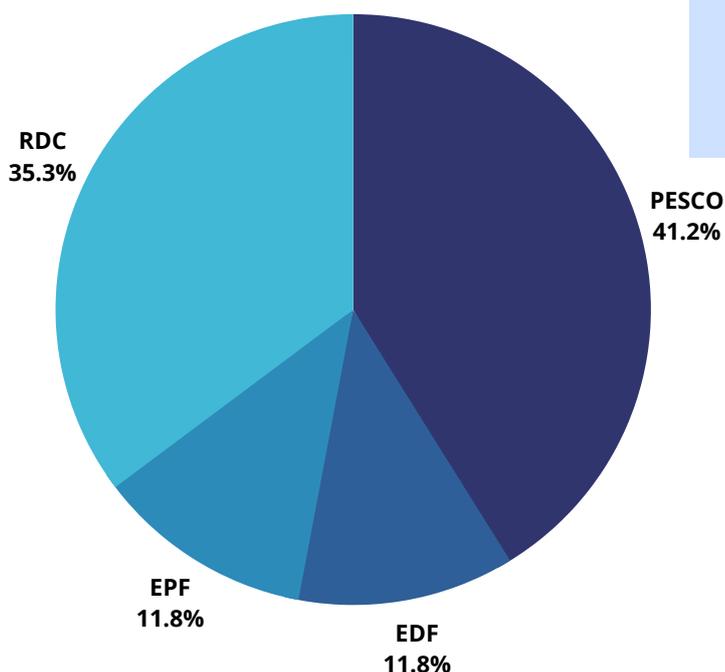
To summarize, all these developments are raising EU's ambitions to become a global security provider and a stronger security and defence partner. But, the view of military associations and trade unions in this regard represents a milestone in order to take into account military personnel's view on the topic. Hence, the aim of this survey is to provide a clearer overview of EUROMIL's members concerning what the next steps for European defence should be.

# MAIN RESULTS

The questions that drove this survey focused on EU's tools that lead towards the development of defence capabilities, in which areas the EU-NATO cooperation should focus and the role of the defence industry.

More precisely, the majority (94.1%) of our members believe that an EU with stronger defence capabilities will have a positive impact for their country.

Concerning which EU defence initiatives - the Permanent Structured Cooperation (PESCO), the European Defence Fund (EDF), the Strategic Compass' Rapid Deployment Capacity (RDC) and the European Peace Facility (EPF)- will lead towards enhanced capabilities, the answers were diverse. All initiatives were deemed as essential but, PESCO was labelled as the most important tool for the Armed Forces.



*Cooperation between the participating Member States at PESCO was deemed as the most important tool for the national Armed Forces*

# MAIN RESULTS

The role of the European Defence Industry is becoming extremely important for investments, while the European Commission will work to further incentivise joint procurement of defence capabilities. Besides, and according with the Strategic Compass, the security and defence sector will be in line with the EU's goal of climate-neutrality by 2050 under the European Green Deal but without reducing operational effectiveness. However, current discussions on the taxonomy regulation may pose restrictions to the defence industry if it does not adapt to climate change. According to our members' responses, 88,2% believe that the defence industry should not face any restriction and gradually adapt to climate change.

Cooperation with partners also represents an important pillar in the Strategic Compass. The EU-NATO relationship is evolving and includes cooperation in many areas, as in cyber and hybrid threats, climate change, military capabilities and gender equality. According to our members, the most important area that the EU-NATO cooperation should focus on is technological developments to address hybrid threats (58.8%) and the development of military capabilities (29.4%).

***Technological developments to address hybrid threats and military capabilities represent two important areas for cooperation between the EU and NATO, while climate change and gender equality were labelled as less important.***

# PARTICIPANTS

EUROMIL members that participated in the survey in alphabetical order:

- ACMP-CGPM, Belgium
- AFM, Malta
- ANS, Portugal
- AP, Portugal
- ASSODIPRO, Italy
- AUME, Spain
- BUAFWA, Bulgaria
- CAROA, Cyprus
- DBwV, Germany
- LSA, Latvia
- SAMO, Sweden
- SOVCG, Montenegro
- ZV SR, Slovakia



# RESULTS BY COUNTRY

## Belgium

For Belgium the most important tool that would enhance EU defence capabilities is **PESCO**, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** is a priority.

## Bulgaria

For Bulgaria the most important tool that would enhance EU defence capabilities is **PESCO**, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in developing **military capabilities** is a priority.

## Cyprus

For Cyprus the most important tool that would enhance EU defence capabilities is the **Rapid Deployment Capacity** under the Strategic Compass, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** is a priority.

## Germany

For Germany the most important tool that would lead to a stronger EU is the **European Peace Facility**, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** is a priority.

## Italy

For Italy the most important tool that would enhance EU defence capacities is **PESCO**, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in developing **military capabilities** is a priority.

# RESULTS BY COUNTRY

## Latvia

For Latvia the most important tool that would enhance EU defence capacities is **PESCO**, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in developing **military capabilities** is a priority.

## Malta

For Malta the most important tool that would enhance EU defence capabilities is **the Rapid Deployment Capacity** under the Strategic Compass, while the role of the defence industry does not play an important role in this regard. However, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in developing **military capabilities** is a priority.

## Montenegro

For Montenegro the most important tool that would enhance EU defence capabilities is **PESCO**, while the role of the defence industry is also deemed as an important one. But, the European Defence Industry should face restrictions if it does not move towards climate change adaptation. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** is a priority.

## Portugal

For Portugal, the European Defence Fund (for ANS, and AP), the Rapid Deployment Capacity (for AP) and the European Peace Facility (for ANS) represent important tools that would enhance EU defence capacities, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** (for AP), **developing military capabilities** (for ANS) and **ensuring gender equality** (for ANS) represent essential sectors for enhanced dialogue between the two organisations.

# RESULTS BY COUNTRY

## Slovakia

For Slovakia the most important tool that would enhance the EU defence sector is **PESCO**, while the role of the defence industry is also deemed as an important one. Hence, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** is a priority.

## Spain

For Spain the most important tool that would enhance EU defence capacities is **the Rapid Deployment Capacity** under the Strategic Compass, while the role of the defence industry does play an important role in this regard. But, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in developing **military capabilities** is a priority.

## Sweden

For Sweden the most important tool that would enhance EU defence capabilities is **PESCO**, while the role of the defence industry is also deemed as an important one. But, the European Defence Industry should gradually adapt to climate change without facing any restrictions. Concerning EU-NATO relations, cooperation in **technological developments to address hybrid threats** is a priority.

# CONCLUSION

This survey highlighted that developing EU defence capabilities has a positive outcome for the Armed Forces, not only of Member States but of partner countries too. It is also important to note that the majority of the participants highlighted that PESCO represents an EU tool that could truly enhance defence capabilities and that the European Defence Industry's role is considerably increasing. Lastly, EU-NATO cooperation should not only emphasize on military capabilities, but also on addressing emerging threats, as hybrid ones. Today's threats, as climate change, cyber and hybrid threats represent complex domains, which no one can deal alone with. Thus, cooperation with like-minded organisations and states is essential.



## No. 01 – **Stronger EU defence capabilities**

The majority of the participants highlighted that the further development of defence capacities at a European level will have a positive impact on their country's Armed Forces.



## No. 02 – **EU-NATO cooperation**

EU-NATO cooperation on technological developments to address hybrid threats represents the most important sector for our members.



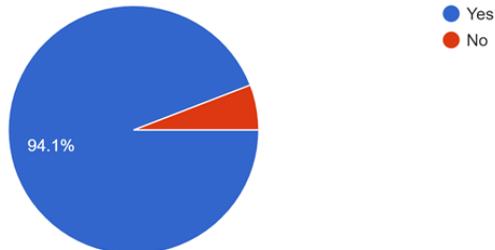
## No. 03 – **European Defence Industry and climate change**

Defence industry will play an important role for the EU to reach its ambition of strategic autonomy, but it remains essential to gradually adapt to climate change.

# ANNEX

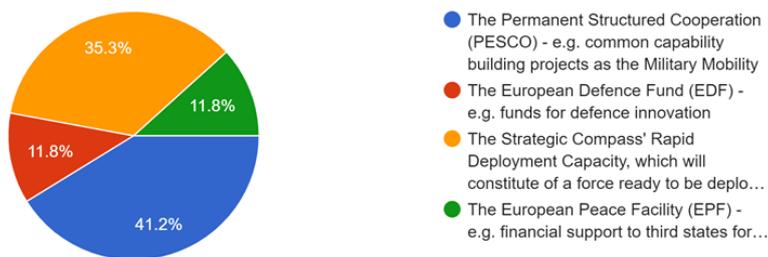
Do you think that a European Union with stronger defence capabilities will have a positive impact for your country?

17 responses



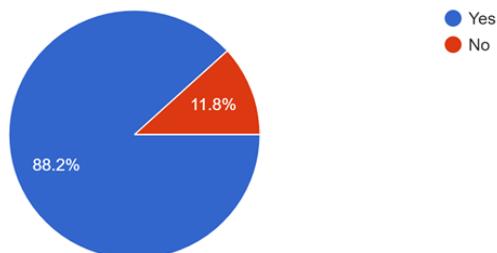
Which of the following EU defence initiatives do you think is most important for the needs of your country's Armed Forces?

17 responses



Do you think that the European defence industry plays an important role for the EU to become more autonomous?

17 responses



On which areas should the EU-NATO relationship focus on?

17 responses

