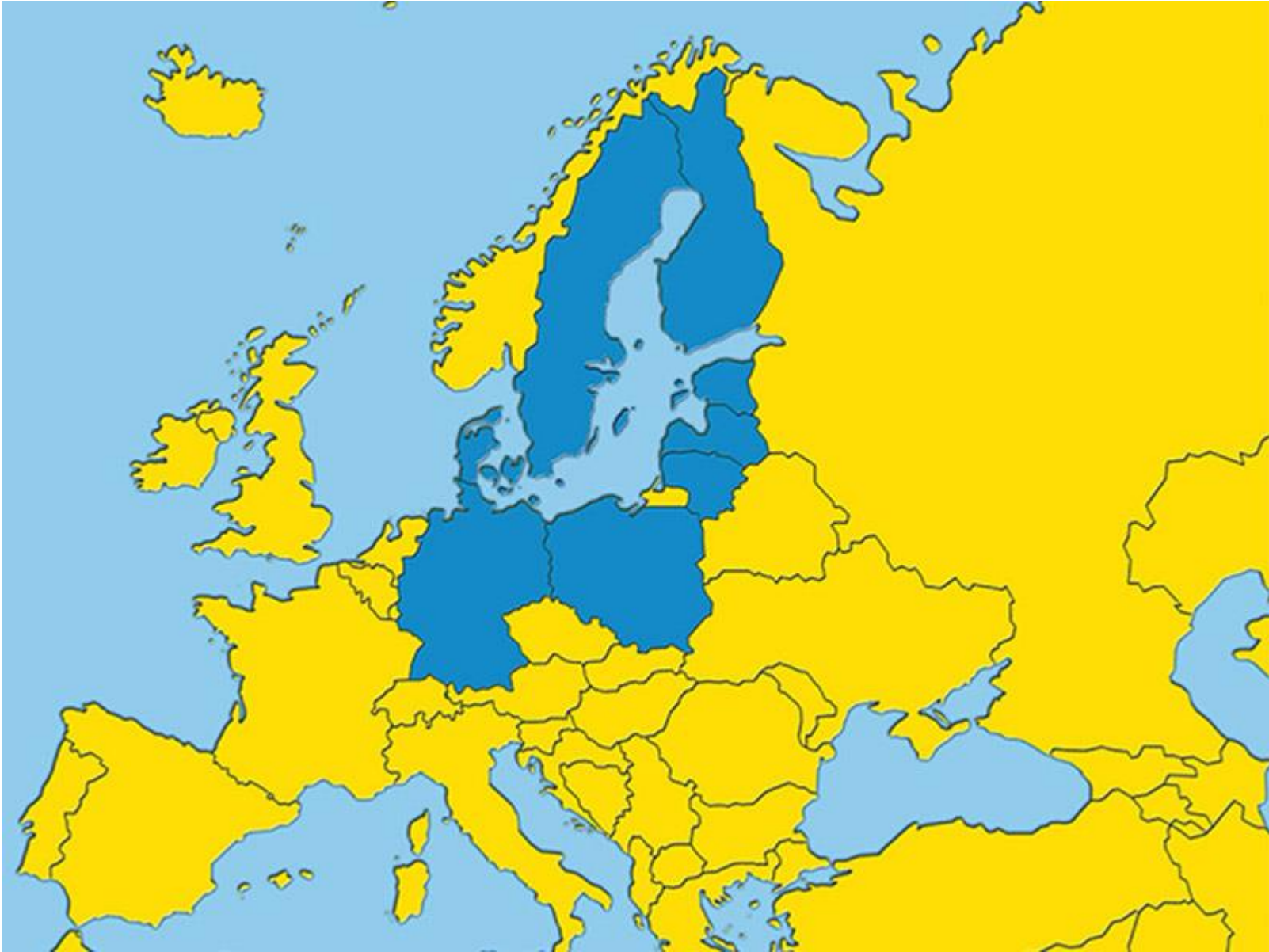


Europe du Nord – exemples de dynamique de coopération régionale

Nordic defence cooperation

Sorbonne, Paris, 10 avril, 2019

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Agenda

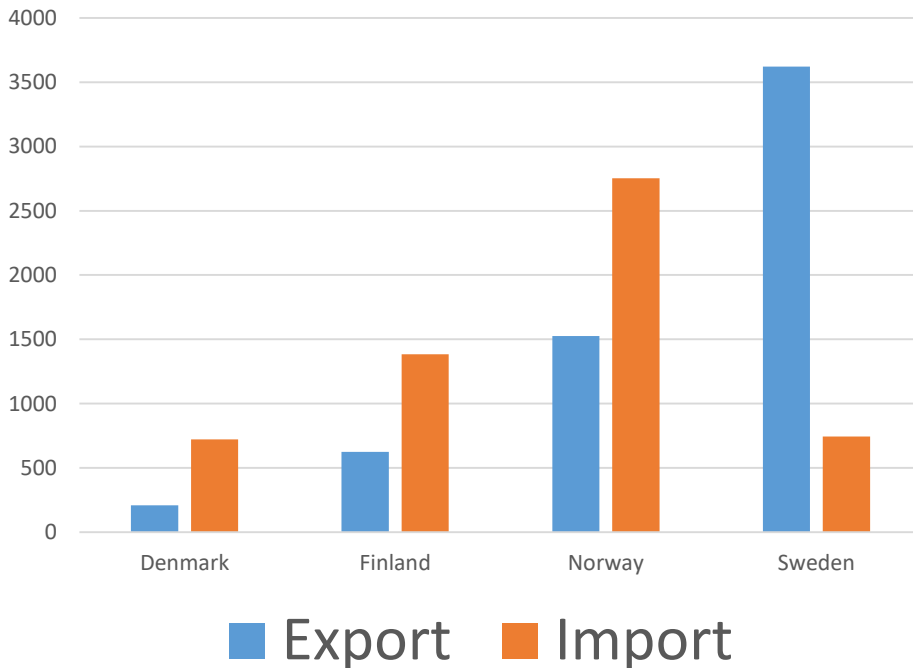
- Focus on Nordic countries (Denmark, Finland, Norway, Sweden)
 - Similarities and differences
- Defence industry
- Different sorts of collaboration
- Links to Baltic region
- Drivers of collaboration
- Links to NATO-EU-EDA
- Links to the US

Defence export & import

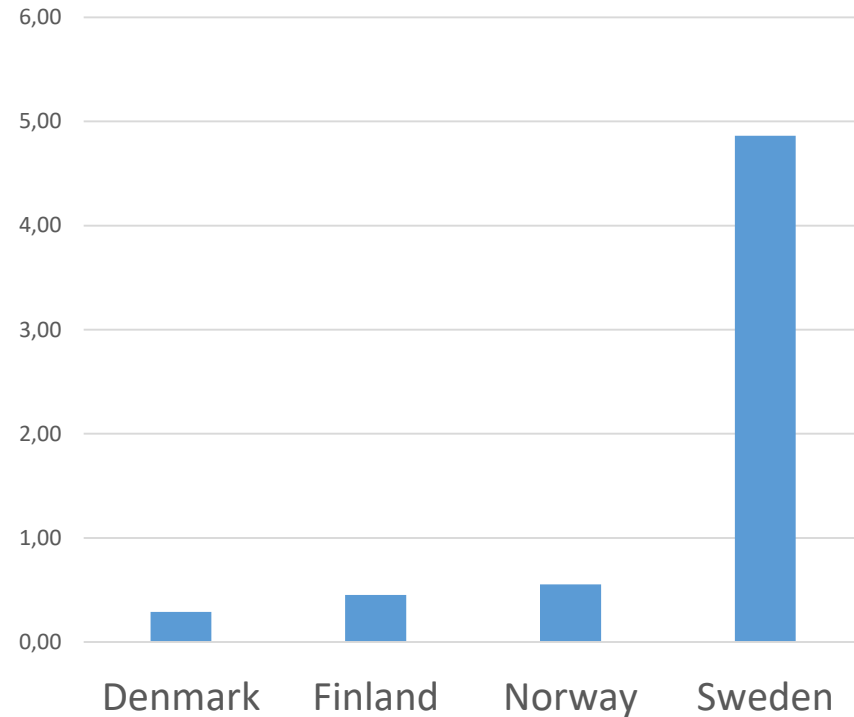
Sum 2009-2018 million USD

	Export	Import	Ratio
Denmark	209	722	0,29
Finland	625	1383	0,45
Norway	1525	2753	0,55
Sweden	3622	745	4,86

Defence export and import 2009-2018
- Nordic countries - million USD



Ratio export/import



Defence industry

Company	Nation	Defense News Top 100	Turnover million USD	Employees	% defence
Saab	Sweden	32	3 090	16 400	84
Kongsberg	Norway	81	771	6 800	44
Patria	Finland	90	486	2 800	92
Nammo	Norway	95	432	300	80
BAE Systems Hägglunds	Sweden	-	400	700	90
BAE Systems Bofors	Sweden	-	160	300	100
Eurencor	Sweden /Finland	-	60	200	n/a

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-Warshaw 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!