

Strategic Autonomy and Defense Procurement: European Union's Response to Geopolitical Uncertainties

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Abstract. *The escalating geopolitical tensions, exemplified by the ongoing conflict in Ukraine, have precipitated a transformative approach to defense procurement within the European Union. The study analyzes the complex interplay between geopolitical uncertainties, technological innovation, and collective defense industrial policy. By investigating the EU's unprecedented financial commitment to defense infrastructure, the research explores how member states are recalibrating their approach to military readiness, industrial capacity, and technological sovereignty. Utilizing a comprehensive mixed-methods approach, the study provides critical insights into the EU's evolving defense economic strategy, highlighting the shift from traditional procurement models to a more integrated, technologically advanced, and strategically responsive framework. The research critically assesses the potential implications of this massive investment for European defense capabilities, industrial competitiveness, and geopolitical resilience in an increasingly volatile international security landscape.*

Keywords: strategic autonomy, defense procurement, European Union, geopolitical uncertainty, technological sovereignty, military readiness, industrial policy

Introduction

The Russia's full-scale invasion of Ukraine in February 2022 triggered a significant transformation in Europe's geopolitical environment. This event has initiated what numerous observers regard as the most important shift in European security strategy since the end of Cold War (Fiott, 2023). In this unstable context, the notion of strategic autonomy, once a theoretical goal within the European Union, has transformed into an operational necessity. It is obvious that this impacts highly the defence procurement, where enormous financial investments and institutional reforms indicate a growing awareness that Europe's industrial defence capability is crucial for geopolitical influence. We are planning to examine how geopolitical forces can influence the transformation of

EU's defence procurement systems. The study analyses how member states are reconciling the necessity for collective security with the limitations imposed by a defence sector that history has shown us that is quite fragmented. We will start with this inquiry: how are the current geopolitical issues affecting institutional structures, technological objectices, and industrial legislation in European defence procurement?

We have seen in history, that the European defense sector struggled with many inefficiencies caused by the duplication of capabilities, lack of interoperability, and protectionist procurement procedures (Hartley, 2020). These issues were addressed through encouraging initiatives like the European Defence Fund (EDF) and Permanent Structured Cooperation (PESCO), however their impact was limited due to modest budget allocations and conflicting national interests. So, the war in Ukraine has forced a significant reassessment, with EU defense

spending projected to rise to almost €200 billion by 2025, making this the most substantial military investment surge in recent European history (European Commission, 2023).

We have founded this study based on three core hypotheses. Any major geopolitical crises serve as critical junctures that can dismantle those long-standing institutional obstacles to defense integration. Secondly, as nations recognize their weaknesses in supplier networks, the concerns over technological sovereignty are increasingly shaping procurement choices. And third, that contemporary development in procurement goes beyond any simple budget increases, representing a deeper transformation in how the EU connects industrial capacity with defense policy.

This study's relevance goes beyond policy analysis, and from a theoretical point of view it investigates the broader dynamics of security integration within regional alliances and also identifies in which circumstances collaborative defense procurement can succeed. From a more practical perspective, it sheds light on the potential and restrictions that Europe is developing in its defense industrial strategy amid rapid technological advances and escalating security threats.

As methodology we used a mixed-methods approach, integrating quantitative analysis of defense spending trends with qualitative assessments of policy reforms and industrial shifts. The research aims to offer a clear perspective on how European defense procurement is adapting to a very volatile geopolitical landscape, through placing this data-driven analysis in a historical and strategic framework.

Literature review

We will notice across multiple disciplines that the junction of geopolitical instability, defense procurement, and European strategic autonomy has generated significant intellectual focus. In the present research is driven by empirical results, theoretical frameworks, and significant gaps.

Béraud-Sudreau and Meijer (2016) detail how fragmentation across national defense markets has historically resulted among capability duplications and interoperability problems, revealing the conflict between national sovereignty and collective efficiency and how is this defining the development of European defense procurement mechanisms. Their study illustrates the tendency for political considerations to override economic logic in procurement decisions, as national governments prioritize domestic industrial interests over any potential efficiency improvements that could arise from integration.

Calcara (2017) demonstrates through research how member states' are unwilling to give power over defence purchasing decision to EDA, has limited its influence and he states that although EDA is playing a crucial role, its capabilities are restricted in facilitating collaborative procurement. On the other hand, Haroche (2020) cites important implementation obstacles in the establishment of the European Defence Fund and PESCO but maintains that these programs are an important step in shifting from voluntary toward more structured integration.

Fiott (2017) highlights in his research that member states have historically undermined any collaborative programs despite their economic logic, through divergent threat perceptions and industrial priorities. He is introducing a comprehensive analysis for the concept of "pooling and sharing" who identifies both the theoretical efficiency gains and practical political obstacles to joint procurement initiatives. Sweeney and Winn (2020) expand this analysis by examining how Brexit has created both challenges for existing programs and opportunities for deeper integration of European defense integration among remaining members.

Hartley (2020) demonstrates through his work how fragmentation of European defense production has resulted in suboptimal economic outcomes, in various capability domains. His work presents the unique theoretical and empirical challenges of economic of defence procurement

in multinational contexts and offers a comprehensive framework for the analysis of defence market structures.

Bellais and Jackson (2020) suggest that monopsonistic procurement structures have the potential to stabilize industrial bases while also restricting disruptive innovation. This tension is especially relevant in European context, where transnational defence companies are subject to intricate incentive structures that are created by national authorities.

For example, Mauro and Thoma (2022) examine the vulnerabilities in defense supply chains and particular in critical technology areas like microelectronics and advanced materials and their research demonstrates the increasing recognition of these dependencies among European policymakers, as we can see that in recent literature, the concept of technological sovereignty has become an important focus for authors. Supplementing this analysis, Kluth (2021) investigates the extent to which China investments in dual-use technologies have accelerated European concerns regarding the preservation of critical defence industrial capabilities, catalyzing the development of new screening mechanism for foreign investors.

It was noticed a correlation between defence investment and threat perception that has been extensively studied. The changes in the European security environment are examined by Strikwerda (2019) noticing how this can influence the willingness of member states to participate in collaborative procurement programs. External threats can overcome domestic resistance to integration and she provides an important theoretical foundation for understanding current developments.

Numerous other scholars have critically examined the concept of strategic autonomy and Fiott (2018) highlights its conceptual elasticity, tracing its development from its origins in French strategic thinking to its incorporation in EU- level speech. Drent (2018) conducts an additional investigation to explore the tensions between strategic autonomy and transatlantic relations, more specifically the interaction between the development of European capabilities, NATO commitments, and US expectations.

A thorough examination of the impact of the Ukraine conflict on European debates regarding strategic autonomy, has been approached by Latici and Lazarou (2022), highlighting significant shifts in the security policies of Germany, Finland and Sweden. Their research indicates that external shocks have the potential to rapidly alter long-standing strategic postures, with direct implications for defence industrial policies and procurement priorities.

While the existing literature provides valuable insights into individual aspects of European defense procurement, there remains a significant gap in understanding how geopolitical shocks reconfigure the complex interplay between institutional arrangements, technological priorities, and industrial policies. The majority of analyses precede the full impact of the Ukraine conflict, while those that address current developments frequently focus on policy announcements rather than systematic analysis of implementation mechanisms.

This study aims to bridge the gap by integrating theoretical perspectives from security studies, defense economics, and institutional analysis to create a comprehensive framework for understanding how the concept of strategic autonomy is being operationalized through specific procurement initiatives. By examining both the quantitative expansion of defense investment and the qualitative transformation of procurement approaches, this study enhances the comprehension of European security integration under conditions of acute geopolitical pressure.

Methodology

The study implements a comprehensive mixed- methods approach that compiles quantitative

analysis of defense expenditures with qualitative evaluations of policy innovations and institutional adaptations, while it addresses the questions of this research and tests the hypotheses outlined in the introduction.

We analysed data collection and analysis in order to establish macro level patterns and the research design is based on a sequential explanatory approach, while qualitative methods are employed to develop deeper understanding of casual mechanism and implementation challenges. The method is suitable for studying complex policy developments that involve both nuanced institutional processes and measurable economic outcomes.

To interpret complex policy developments we tracked the data changes in European defence procurement patterns in order to compile the quantitative component of this research, as it follows:

1. Defense expenditure data: Defense spending was collected from the EDA Data Portal and NATO Defence Expenditure reports, using data on defence spending by EU member from 2017 to 2024.

2. Procurement contract analysis: We used the EU's Tenders Electronic Daily platform, industry reports and national procurement announcements in order to construct a database of major defense procurement contracts (value >€50 million) awarded by EU member states between 2019 and 2024, where the capability domain, technology type, supplier nationality, and collaborative structure were coded in each contract.

3. Tracking R&D investment: When it comes to R&D investments in European region we use European Commission documentation on European Defence Fund allocations, EDA reports, and national defense ministry publications were used to gather data on defence research and development investments, with a special focus on investments in emerging technology domains that were designated as priorities in the EU's Strategic Compass.

The relationship between threat proximity and changes in procurement was investigated using correlation analysis. In order to detect trends and pattern shifts in procurement behaviour prior to and after February 2022, quantitative analysis was employed through descriptive statistics and time series analysis that identified acceleration or deceleration in procurement initiatives.

The primary methods used for the qualitative phase of the research are the following:

1. Policy document analysis: In order to identify changes in procurement strategies and collaborative mechanisms, a systematic review of policy documents published by EU institutions (Commission, Council, Parliament), analyzing important documents like Strategic Compass, national security strategies published after February 2022, and work programs of European Defence Fund.

2. Case studies: Three case studies were selected to represent different capability domains, collaborative structures and participant configurations and these are: the European Sky Shield Initiative, the IRIS-T SLM procurement consortium, and the PESCO project on Main Battle Tank capability.

The research utilizes an analytical framework that integrates three theoretical perspectives to interpret the collected data:

1. Critical juncture theory: This framework, which is derived from historical institutionalism, helps identify how geopolitical disruptions can create windows of opportunity for institutional innovation by temporarily suspending well- established constraints on policy change (Capoccia, 2015).

2. Technological innovation systems: This approach assists in analyzing the impact of procurement systems on technology development trajectories and industrial specialization patterns, and the method was adapted from innovations studies. (Bergek et al., 2015).

3. Collective action theory: This perspective offers a better understanding of the conditions under which member states surmount coordination challenges to pursue joint procurement initiatives (Olson, 2009).

The integration of these perspectives facilitates a systematic examination of the manner in which institutional structures, geopolitical pressures and technological imperatives interact in order to influence procurement outcomes.

However, a number of methodological constraints must be acknowledged, and the first shows that the effectiveness of many policy initiatives is restricted by the fact that their full implementation remains ongoing. Second, the sensitivity of certain procurement data means that public sources may provide an incomplete representation of actual procurement activities. These limitations were mitigated through meticulous qualification of findings based on data quality.

Results and discussions

This section presents the examination of quantitative and qualitative data that indicate substantial shifts across European procurement patterns, subsequent to the Russian invasion of Ukraine in February 2022. These findings and discussions explore their implications for European strategic autonomy and include the prioritization of specific capability domains and structural reforms in procurement mechanisms and aggregate spending commitments.

We can assess from the data reveals that a pronounced acceleration in defense spending across EU member states started following February 2022, especially because aggregate defense expenditure among EU-27 countries increased by 13.7% in real terms between 2021 and 2023, compared to an average annual growth rate of 3.2% in the 2017-2021 period. This represents the most substantial two-year increase in European defense expenditure in the post-Cold War era, however it is important to note that the distribution of increase has been irregular across states. For example, frontline states, which include the Nordics and those that share borders with Russia or Belarus had an average increase of 21.3%, while other member states averaged 9.4% increases.

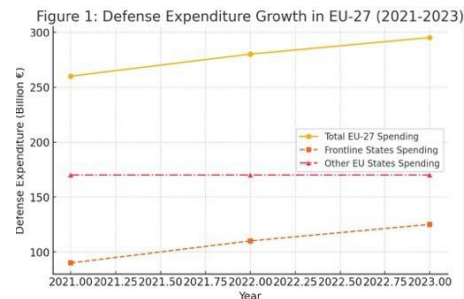


Figure 1. Authors' own research results based on data from the European Defence Agency (EDA) and NATO expenditure reports

It is clearly highlighted in Figure 1, which illustrates these expenditure trajectories, that the aggregate trend and the differentiated response patterns across geographic regions suggest that, the initial spending increases were primarily focused on addressing immediate capability gaps, particularly air defence and artillery systems. Despite this fact, the long-term procurement planning documents published in 2023-2024 reflect a more strategic focus on the development of industrial capacity and technological sovereignty.

The distribution of procurement commitments across major capability domains before and after February 2022 is illustrated in Table 1 and reveals significant changes in capability prioritization, based on the analysis of major procurement contracts (>€50 million).

Table 1. Distribution of Major Procurement Contracts by Capability Domain (% of total value)

Capability Domain	2019-2021	2022-2024	Change
Air Defense	8.7%	17.4%	+8.7%
Artillery Systems	5.3%	12.8%	+7.5%
Command & Control	12.1%	14.3%	+2.2%
Cyber Defense	4.2%	7.9%	+3.7%
Electronic Warfare	3.8%	8.1%	+4.3%
Main Battle Tanks	7.5%	6.8%	-0.7%
Maritime Systems	15.3%	9.4%	-5.9%
Multi-role Aircraft	25.8%	11.7%	-14.1%
Space- based assets	5.6%	8.2%	+2.6%
Other	11.7%	3.4%	-8.3%

Source: Authors' own research results based on data from the European Defence Agency (EDA) and Tenders Electronic Daily (TED).

The data reveals a clear reprioritisation towards capabilities that are directly relevant to high-intensity combat scenarios and there has been a particularly considerable rise in the number of artillery and air defence systems. On the other hand, we can notice a decrease in the proportion of investment that is devoted to maritime systems and multi-role aircraft, despite the fact the total amount spent on these categories has either stayed the same or maybe increased slightly.

Patterns of Collaborative Procurement

The research reveals that prior to February 2022, collaborative programs accounted for 23.4% of the total procurement contract value, demonstrating an important change in collaborative procurement patterns. By 2023-2024 the figure has risen to 34.7%. More significantly, the structure of these collaborative arrangements has evolved, as pre-2022 collaborations were primarily bilateral or involved a small number of similar states, like Nordic Defense Cooperation. However, the data shown after 2022 indicates the development of a larger consortia, especially that these are frequently organized around specific capability deficits rather than pre-existing regional groupings.

We can notice in the analysis of European Defence Fund allocations similarly indicates a strategic shift toward prioritizing projects with direct implications for defense industrial sovereignty.

The comparison of the 2021 and 2023 work programs reveals a heightened emphasis on critical technology areas that were previously dominated by non-EU suppliers, particularly the production of specialized ammunition, advanced materials and semiconductor components. Also, the analysis of the allocations of European Defence Fund similarly suggests a strategic shift towards the prioritization of initiatives that support defence industrial sovereignty.

Policy Response Framework in Procurement Coordination

The qualitative examination of policy documents will reveal to us several notable institutional innovations in European defense procurement coordination and the most significant are:

- European Defence Industrial Strategy- This framework document was adopted in March 2023 and it represents the EU's inaugural comprehensive effort to integrate industrial policy, technological development, and procurement planning.

- Joint Procurement Task Force- This mechanism has accelerated the collaborative procurement for any urgent capabilities requirements and it was instituted by the European Commission in April 2022. However as of December 2023, the JPTF enabled €5.6 billion in collaborative contracts. Most were for ammunition and air defense systems, showcasing exceptional efficiency in coordinating multi-national procurement.

- Simplified Financing Mechanisms: This mechanism was especially useful for Central and Eastern European nations with constrained resources, as the European Peace Facility's expansion and procedural simplification have eliminated substantial barriers to collaborative procurement.

Transitioning from a conventional focus on market liberalization toward a more proactive facilitation of collaborative acquisition initiatives, these institutional developments reflect a significant advancement in EU procurement coordination.

Implementation Challenges and Adaptations

Despite any of these advances, implementation challenges remain significant and this research identifies some primary obstacles to the successful implementation of the emerging policy framework:

- Divergent Industrial Priorities- Member states continue to prioritize domestic industrial interests in major procurement decisions, with increasing emphasis on securing workshare within collaborative programs rather than insisting on purely national solutions.

- Technological Readiness Gaps- The data reveals some persistent challenges in translating R&D investments into deployable capabilities, especially in new technology sectors like artificial intelligence, quantum computing, and autonomous systems, where European companies frequently trail behind their U.S. or Asian competitors.

- Administrative Capacity Constraints: In particular, we can see smaller member states that report significant limitations in administrative capacity to engage effectively with new EU-level procurement mechanisms. This means that there is an important implementation gap between policy aspirations and execution proficiency.

In response to the above challenges, the study identifies several adaptive mechanisms that have emerged at both national and EU levels and these include the creation of specialized procurement agencies with enhanced technical capabilities. It also encompasses the formation of clearing-house mechanisms to align capability needs with industrial capacity among member states, and the implementation of streamlined procurement procedures for collaborative initiatives. The initiatives that were launched after February 2022 provide a deeper knowledge to practical implementation of strategic autonomy in procurement decisions and below we will analyse three of them:

Case Study 1: European Sky Shield Initiative

The European Sky Shield Initiative, launched in August 2022, represents a novel approach to addressing immediate capability gaps while building long-term European capacity. The initiative combines off-the-shelf procurement of U.S. and Israeli air defense systems with an explicit technology transfer and industrial participation component designed to enhance European production capabilities.

The research findings indicate that ESSI demonstrates both innovations and limitations in the emerging procurement model, for example it has enabled rapid acquisition of needed capabilities across 17 participating states. On the other hand, data reveals tensions between short-term operational needs and longer-term industrial sovereignty goals, because some participants

prioritizing speed of delivery over European content. The case illustrates how the concept of strategic autonomy is being operationalized pragmatically rather than dogmatically.

Case Study 2: IRIS-T SLM Procurement Consortium

The IRIS-T SLM consortium was formed in September 2022 and it represents a different model focused on scaling production of an existing European system. We can notice in this analysis how this consortium approach enabled participating states to achieve significant cost reductions (estimated at 23%/ unit) while significantly expediting production timelines through coordinated, multi-year procurement commitments.

This is a case that clearly demonstrates how the current geopolitical context has created conditions for overcoming traditional obstacles to collaborative procurement. To be more specific, the data indicates that threat urgency has diminished concerns about *juste retour* (industrial return) that historically complicated similar initiatives.

Case Study 3: Main Battle Tank Capability Development

Significantly restructured in October 2022, the PESCO project on Main Battle Tank capability development exemplifies the difficulties of harmonizing near-term capability needs with long-term technology development.

This case study that substantially highlights the complex interaction between operational imperatives, industrial interests, and technological aspirations in European defense procurement. The findings suggest that successful navigation of these tensions requires both flexible procurement mechanisms and explicit political commitment to long-term cooperation beyond immediate crisis response.

The quantitative and qualitative data reveal accelerating trends in industry consolidation in specific capability domains, particularly land systems and ammunition production. Should we examine the merger and acquisition activity in the European defense sector we will notice a 47% increase in transaction volume from 2021 to 2023, especially concentrated in areas directly relevant to high-intensity conflict capabilities.

Even more significantly, the research reveals notable trends of specialization because some member states increase their focus to industrial policies on capability niches instead of maintaining comprehensive defense sectors. We see this as an important evolution in European industrial strategy, maybe enabling more efficient resource allocation while creating new forms of interdependence among member states.

Before 2022, the examination of European Defence Fund distributions and national R&D expenditures indicate significant changes in innovation objectives, as funding in innovation were allocated across many technology sectors, focussing on dual-use applications. When we analyse data from post-2022 it rather indicate an enhanced focus on capabilities that can be relevant to high-intensity combat scenarios, specifically counter-drone systems, electronic warfare, sophisticated weapons, and robust command and control networks.

A significant discovery pertains to the rise of supply chain resilience as a primary focus in procurement strategy. Examination of policy papers indicates significant new initiatives aimed at identifying crucial dependencies, diversifying supplier networks, and creating strategic reserves of essential components and materials.

This means that, beyond the conventional emphasis on platforms and systems to include the wider industrial ecosystem necessary for enduring operational capability, we are facing a crucial expansion of procurement ideology. The research reveals that this transition is especially

significant in ammunition manufacture, specialised electronics, and essential raw materials, where European reliance on non-EU suppliers has previously received minimal consideration in procurement strategies.

Conclusion

In this research we have examined to what extent the European defence procurement strategies and their correlation with the concept of strategic autonomy have been altered by geopolitical uncertainties, especially those resulting from the Ukraine conflict. We can conclude that the findings reveal a significant recalibration in both quantitative investment patterns and qualitative procurement strategies, with important implications on European defence capabilities, industrial structures and technological development trajectories.

The analysis shows that the environment created by the post-February 2022 events has served as a critical juncture in European defence cooperation, thus establishing the necessary conditions for institutional innovation. We have also noticed significant policy advancement that had previously been constrained by divergent national interests and an unprecedented scale of financial commitment, especially from traditionally restrained countries like Germany. These efforts have been accompanied by equally significant developments in procurement coordination mechanisms, industrial instruments and capability prioritization frameworks.

Three key conclusions emerge from this research and the initial one shows how the concept of strategic autonomy has transitioned from an abstract political aspiration to an operational principle, that is becoming more deeply embedded in specific procurement decisions and industrial initiatives. This is an evolution where European policymakers have been characterized by a growing pragmatism, as they have attempted to balance ideals of complete autonomy against practical requirements for capability delivery and interoperability with their allies.

Secondly, the research identifies the significant shift from fragmented national approaches to a more coordinated European procurement strategy. Data also indicates meaningful progress that has been made in overcoming historical obstacles to collaboration, although this trend remains still incomplete and unequally distributed across capability domains. We can see an important transition from traditional European defense procurement practices, to the emergence of new consortium models, simplified mechanisms for financing, and joint acquisition frameworks.

Third, the findings point to an emerging reintegration of procurement policy with broader industrial and technological strategies. After decades of treating defense acquisition primarily as a market liberalization challenge, European institutions and member states are increasingly approaching procurement as an instrument of industrial policy and technological sovereignty. This represents a significant conceptual shift with far-reaching implications for European defense industrial structures. We can notice that after decades of regarding defence acquisition primarily as a market liberalization challenge, the European institutions and member states are rather approaching procurement policy as an instrument to be reintegrated with broader industrial and technological strategies.

The current research should recognize its own limitations like the complete implementation and the effects of various initiatives that were examined are still uncertain due to their recent initiation. Also, the research was primarily focused on formal policy developments and quantifiable procurement patterns, so any informal coordination mechanism and political dynamics that influence implementation deserve further and more in depth investigation.

Another constraint would be that the research hasn't shown enough attention on the adaption processes in smaller countries, focusing the research on EU-level developments and

larger member states.

We can address these limitations for a future research, especially that longitudinal studies that monitor the implementation of current initiatives over time would offer valuable insights into their sustainability beyond the immediate crisis response. A comparative analysis of the domestic interpretation and implementation of strategic autonomy principles would improve understanding of potential divergence or convergence in procurement approaches between member states. And finally, more detailed examination of specific technology domains would be beneficial in assessing the potential for achieving meaningful sovereignty in critical capability areas.

It is important to see the research has shown several implications for European policymakers, like suggesting that maintaining momentum in defense investment and procurement reform will require that the coordination mechanism used during the present crisis period to be institutionalized. Another aspect is that they underscore the necessity of more sophisticated strategies for balancing between long-term industrial development and immediate capability delivery. And lastly, they emphasize the significance of establishing procurement strategies that effectively can manage the interdependence between members states and between Europe and its partners.

Europe navigates an increasingly volatile security environment, and procurement policies seems to emerge as a critical instrument for applying strategic concepts into operational capabilities. Although we can see that substantial progress has been achieved in the development of a more effective defence acquisition strategy, the challenge of building a truly coherent European defense technological and industrial base remains substantial. As we are living in an era of escalating great power competition, the manner in which European institutions and member states will confront this challenge will have a substantial impact on both Europe's strategic position and defence capabilities.

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