

ROMANIA'S DEFENCE POLICY AND NATIONAL SECURITY INTERESTS IN THE EUROPEAN DEFENCE FUND AMIDST EUROPEAN DEFENCE INTEGRATION

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ABSTRACT

This paper critically examines Romania's participation in the European Defence Fund (EDF) within the broader framework of European defence integration. While the EDF represents the EU's most ambitious defence-industrial policy initiative, aimed at fostering technological innovation and strategic autonomy, Romania's engagement remains peripheral, raising concerns about its ability to align European defence cooperation with its national security interests. Despite formally endorsing EU defence initiatives, Romania has failed to capitalise on EDF funding due to institutional fragmentation, an underdeveloped national defence research and industry, and a strategic preference for government-to-government acquisitions from non-EU suppliers. Using a mixed-methods approach, the study integrates quantitative data analysis of EDF financial allocations and participation rates with qualitative policy analysis of Romania's defence strategy. Findings indicate that Romania's marginal role in EDF consortia, absence of leadership positions, lack of defence industry networks and clusters, and an underdeveloped defence research sector have hindered its ability to align national security objectives with EU defence priorities. The paper concludes with policy recommendations to enhance Romania's role in the EDF and ensure that participation in EU defence initiatives serves its long-term strategic interests.

KEYWORDS: defence capability, defence-industrial cooperation, defence policy, European Defence Fund (EDF), EU defence package

1. Introduction

The evolving security landscape of the European Union (EU) over the past two decades has necessitated a shift toward a more integrated and autonomous defence architecture. This transformation is shaped by increasing geopolitical volatility, transatlantic uncertainties, and the EU's strategic ambition to reduce external dependencies in security and defence. The Strategic Compass for Security and Defence, adopted in 2022, underscores the EU's intent to enhance its ability to act

autonomously and develop its own defence capabilities in response to emerging security threats and power rivalries (European External Action Service, 2022). However, since its adoption, new challenges, including the unpredictability of the United States' defence posture towards Europe (Politico, 2025; Reuters, 2025), entrenched Euroscepticism (Vasilopoulou, 2009; Brack, 2015), and the growing fragmentation of EU strategic consensus due to the rise of far-right movements (Davidson & Saull, 2017; Becker &

Ondarza, 2024), have further complicated efforts to consolidate European defence integration. These developments underscore the urgency of deepening European defence cooperation, particularly through the European Defence Fund (EDF), Permanent Structured Cooperation (PESCO), and the Coordinated Annual Review on Defence (CARD), which collectively aim to establish a more cohesive and technologically advanced European defence-industrial ecosystem.

The EDF is the most ambitious defence-industrial initiative in EU history, not merely a financial instrument but a strategic policy tool designed to enhance Europe's defence technological and industrial base (EDTIB). Unlike previous EU security initiatives, which largely remained intergovernmental, the EDF is embedded within the EU's institutional and legal framework, making it a supranational mechanism for shaping the future of European defence governance. Its primary objective is to foster joint capability development, collaborative defence research, and greater industrial integration, laying the foundation for a stronger, more competitive, and strategically autonomous European defence sector. However, its effectiveness remains debated, as it does not address immediate operational needs but rather focuses on long-term technological innovation and industrial competitiveness (Fiott, 2020; Biscop, 2020).

Despite the strategic significance of these initiatives, member-state participation remains highly uneven, with France, Germany, Italy, and Spain dominating EDF-funded projects, while Romania struggles to secure meaningful involvement. Romania's engagement with the EDF reflects a persistent gap between its political commitment to EU defence integration and its practical implementation within the national defence-industrial landscape. While the country has formally endorsed the EU's defence initiatives and

recognised the importance of European security cooperation in its 2020–2024 National Defence Strategy, its participation in EDF-funded projects has been marginal. Romania's limited absorption of EDF funding and its absence from key multinational defence consortia suggest that it has yet to develop a coherent strategy to align its defence-industrial base with EU objectives.

This paper critically examines Romania's participation in the EDF within the broader framework of European defence integration. It seeks to identify the structural, industrial, and institutional challenges that have hindered Romania's role within the fund, particularly in comparison to more strategically positioned EU states. To achieve these objectives, the research employs a mixed-methods approach, combining quantitative financial and participation data with qualitative policy analysis. The quantitative component involves an analysis of financial allocations, project participation rates, and consortium leadership structures to provide an empirical basis for assessing Romania's performance relative to other EDF participants. The qualitative component focuses on policy and discourse analysis, examining official EU defence policy documents, Romania's 2020–2024 National Defence Strategy, and key European Commission reports on EDF implementation. This method facilitates a critical evaluation of Romania's strategic positioning, defence procurement policies, and institutional coordination challenges within the EDF framework.

By integrating policy-based and data-driven analysis, this research presents a comprehensive assessment of Romania's engagement in the EDF, highlighting missed opportunities, structural limitations, and potential policy solutions to enhance its role in the evolving European defence-industrial landscape.

2. The European Defence Fund: A Strategic Pillar for European Defence Integration

European defence is undergoing a profound transformation, driven by a renewed commitment to strategic autonomy and military capability development. In an increasingly volatile geopolitical landscape, EU member states have significantly expanded their defence expenditures, reflecting a decisive shift towards strengthening collective security and reducing external dependencies. This financial commitment is evident in the steady increase in total EU defence spending, which rose from €214 billion in 2021 to €326 billion in 2024, marking a substantial investment in European defence preparedness (Council of the European Union, n.d.). More than 30% of these expenditures have been allocated to defence investments, which have nearly doubled from €52 billion in 2021 to €102 billion in 2024. A considerable portion of these investments has been directed towards the procurement of new defence products, which accounted for over 80% of total defence investments in 2023, rising further to 88.2% in 2024. At the same time, investment in defence research and development (R&D) has followed a similar upward trajectory, growing from €11 billion in 2023 to €13 billion in 2024, underscoring the EU's commitment to technological innovation and the enhancement of its defence industrial base (Council of the European Union, n.d.).

At the core of this broader effort to consolidate European defence capabilities lies the European Defence Fund (EDF), a policy initiative designed to address longstanding inefficiencies and foster deeper integration. The EDF is not merely a financial instrument but a strategic mechanism for restructuring the European defence landscape, linking research, capability development, and industrial policy under a supranational framework (Fiott, 2020). Unlike previous intergovernmental cooperation efforts, which were often hindered by national priorities and

industrial fragmentation, the EDF seeks to harmonise member states' efforts within a shared strategic vision for European defence.

Conceived in 2017 and formally launched in 2021, the EDF was designed to address inefficiencies in European defence spending, which for decades had been shaped by national strategies rather than collective EU priorities (European Commission, 2017). Historically, over 80% of procurement and 90% of military research had been conducted at the national level, leading to duplication of efforts, higher costs, and operational incompatibilities (Giumelli & Marx, 2023). The EDF aims to counteract these inefficiencies by incentivising cross-border collaboration, fostering economies of scale, and strengthening the European Defence Technological and Industrial Base (EDTIB).

Before its full-scale implementation, the European Commission initiated a preparatory phase between 2019 and 2021 to refine the EDF's regulatory and financial mechanisms. This phase included two key pilot programmes: the Preparatory Action on Defence Research (PADR), which allocated €90 million to early-stage defence innovation, and the European Defence Industrial Development Programme (EDIDP), which provided €500 million for joint defence-industrial projects (European Commission, n.d.a, n.d.b). These initiatives, overseen by the European Defence Agency (EDA), played a crucial role in shaping the fund's governance, refining its funding allocation framework, and ensuring industry participation (Csernatonni & Martins, 2019).

With a total budget of €8 billion for 2021-2027, the EDF seeks to function as a defence investment multiplier, reinforcing the EU's ambition to establish a self-reliant European defence framework (European Commission, 2017). However, this budget was reduced from an initially proposed €13 billion, largely due to financial constraints imposed by the COVID-19 crisis, raising concerns about whether the EDF has the capacity to drive large-scale technological

advancements (Clingendael Institute, 2021). While the fund represents a significant step towards strengthening European defence cooperation, its budget remains limited compared to the defence expenditures of global powers such as the United States and China. This has led some experts to question whether the EDF will act as a genuinely transformational force or merely serve as a supplementary mechanism to national defence strategies (Biscop, 2020).

EDF funding is allocated through a highly competitive selection process, ensuring that only a fraction of project proposals receive support. Between 2021 and 2023, the European Commission’s Directorate-General for Defence Industry and Space (DG DEFIS) received 512 project proposals, of which only 157 were selected, reflecting an average success rate of just 30% (Foundation for Strategic Research, 2024). The scale and complexity of EDF consortia further highlight the growing emphasis on multinational collaboration. In 2021, selected projects involved an average of 18 participants per project from 8 EU member states. This figure increased to 22 participants per project from over 9 states in 2022, before

declining to 17 in 2023, demonstrating the continued cross-border cooperation required for EDF-funded initiatives (Foundation for Strategic Research, 2024; DG DEFIS, 2023).

Therefore, beyond its financial role, the EDF functions as both a strategic policy instrument and a diplomatic tool, closely aligned with the EU’s broader security objectives. It directly supports the development of next-generation defence technologies, reinforcing European defence sovereignty while reducing reliance on external suppliers. Its integration with the EU’s defence level of ambition underscores its role in enhancing rapid reaction capabilities, strengthening industrial cooperation, and ensuring interoperability among EU forces (European External Action Service, 2022). The fund’s budgetary significance is evident in its consistent share of total EU military expenditures, accounting for over 80% in 2021 and projected to remain above 75% by 2025 (Council of the European Union, n.d.). This underscores the EU’s recognition of the EDF as a cornerstone in the ongoing effort to strengthen Europe’s defence readiness.

Table no. 1

Military expenditure in the European budget (commitment appropriations, million euros)

<i>Subject and chapter</i>	<i>2021</i>	<i>2022</i>	<i>2023</i>	<i>2024</i>	<i>2025</i>
Total EDF	942.9	937.7	945.3	1001.7	1419.1
Mobility	225.4	230.1	293.5	249.6	244.5
European defence industry reinforcement through common procurement act (EDIRPA)				260	40
The Act in Support of Ammunition Production (ASAP)			156	343	
Others			30	96	111
Total	1 172.6	1 177.4	1 428	1 964.4	1 833.3

(Source: Brehon, 2025, p. 7)

However, the EDF’s emphasis on long-term technological innovation rather than immediate operational readiness has raised concerns about its capacity to address

Europe’s short-term security needs. Some analysts argue that while investment in research and development (R&D) is crucial for long-term competitiveness, the fund does

little to resolve urgent defence capability gaps, particularly in the wake of the war in Ukraine (IISS, 2024). The increasing security challenges facing Europe have heightened the need for rapid procurement, force modernisation, and operational readiness, areas where the EDF's impact remains limited.

To fully assess the EDF's effectiveness, it is essential to acknowledge the structural and operational challenges that continue to shape its implementation. While the EDF represents a landmark effort in fostering European defence integration, its ability to deliver transformative results remains a subject of debate. A key concern is the persistence of industrial fragmentation and strategic divergence among EU member states. Despite the fund's supranational character, national interests still play a significant role in shaping defence-industrial cooperation, leading to uneven participation and disparities in access to funding. Larger defence economies, including France, Germany, Italy, and Spain, dominate EDF-supported projects, while smaller member states, such as Romania, struggle to secure substantial involvement in high-value initiatives. This asymmetry in funding distribution raises concerns about whether the EDF is truly fostering an inclusive and integrated European defence market or simply reinforcing existing industrial hierarchies (Giumelli & Marx, 2023).

Another fundamental issue concerns the EDF's financial limitations relative to its strategic ambitions. Although the fund's €8 billion budget for 2021-2027 marks a significant commitment, it remains below the initially proposed €13 billion, a reduction largely attributed to the financial constraints imposed by the COVID-19 crisis (Clingendael Institute, 2021). Given the rising defence investments across the EU and the escalating costs of military innovation, some analysts question whether the EDF has sufficient resources to drive large-scale technological advancements (European

Commission, 2017). When compared to the defence budgets of global powers such as the United States and China, the EDF remains relatively modest, raising concerns that it may function more as a supplementary mechanism than as a transformational force in European defence cooperation (Biscop, 2020).

These challenges highlight the broader complexities of European defence integration. While the EDF plays a critical role in addressing inefficiencies, reducing duplication, and fostering multinational collaboration, its long-term effectiveness will depend on mitigating industrial imbalances, securing sustained financial commitments, and ensuring equitable participation among all EU member states (Fiott, 2020). If these structural constraints remain unaddressed, the EDF risks becoming an instrument that reinforces existing disparities rather than a true catalyst for European defence cohesion and technological sovereignty.

Despite these challenges, the EDF remains a cornerstone of European defence integration, working in synergy with PESCO (Permanent Structured Cooperation) and CARD (Coordinated Annual Review on Defence). Together, these initiatives form a structured defence architecture, ensuring that EU member states cooperate not only in research and procurement but also in strategic defence planning to enhance interoperability (European External Action Service, 2022). However, for the EDF to achieve its long-term objectives, it must bridge the gap between national and EU-level defence priorities, address budgetary constraints, and promote a more equitable distribution of resources across all member states.

Looking ahead, as the EU moves toward even more ambitious defence projects, such as the European Defence Industry Programme (EDIP) – which aims to inject €100 billion into defence manufacturing and procurement – the EDF is expected to play an even greater role in shaping Europe's defence future (Brehon, 2025). However, without stronger political commitment, institutional

streamlining, and a clear strategy for ensuring balanced participation, the fund may struggle to fully realise its transformative potential.

Ultimately, while the EDF represents a pioneering step toward institutionalising European defence cooperation, its effectiveness will depend on its ability to overcome industrial asymmetries, budgetary constraints, and competing national interests. If these challenges are addressed, the EDF has the potential to reshape European defence governance, ensuring that Europe is not only more competitive in the global defence market but also better positioned to act autonomously in an increasingly volatile security landscape.

3. Romania's Struggle and Prospects in the European Defence Fund

Romania's engagement with the European Defence Fund reflects a persistent disconnect between political commitment and practical implementation. While the country has consistently endorsed EU defence integration efforts, its contribution to EDF-funded projects remains marginal, highlighting institutional, strategic, and industrial challenges that have hindered meaningful participation. Unlike other EU member states that view the EDF as a strategic policy initiative designed to strengthen Europe's defence-industrial base and foster greater operational integration, Romania appears to perceive it primarily as a financial mechanism, failing to leverage it as an instrument for long-term comprehensive defence-industrial development. This narrow approach has prevented Romania from fully capitalising on EU funding opportunities, leaving it at the periphery of the European defence-industrial landscape.

Although Romania's 2020-2024 National Defence Strategy explicitly acknowledges the importance of EU-led security and defence initiatives, this recognition has not translated into concrete actions that would modernise its defence industry or strengthen cooperation with

European partners. The strategy outlines Romania's potential to contribute to EU defence transformation and lists active participation in strengthening the EU and deepening integration processes as national security objectives. Furthermore, it emphasises the need for complementarity between EU and NATO security initiatives, underscoring the importance of aligning defence investments and capability development with broader European strategic priorities. However, in practice, these policy commitments have remained largely rhetorical, as Romania has yet to fully utilise existing EU mechanisms to enhance its defence-industrial base, develop cross-border partnerships, or integrate into pan-European defence supply chains.

A key factor limiting Romania's engagement with the EDF is its defence procurement strategy, which remains heavily reliant on government-to-government (G2G) acquisitions of off-the-shelf military equipment, predominantly from the United States. This long-standing procurement model prioritises immediate operational needs over long-term investments in domestic defence-industrial capabilities. As Csernatonu (2024) notes, Romania has opted for U.S.-made systems, such as the Patriot missile defence system, HIMARS, and F-16 and F-35 fighter jets, rather than pursuing EU-supported cooperation mechanisms. While this procurement approach ensures interoperability with NATO forces, it has also diverted Romania's defence spending away from EDF-backed industrial development programmes (Csernatonu, 2024; Soare, 2024). The Romanian government justifies this approach on strategic grounds, citing its sovereign right to procure military equipment and its strong transatlantic defence commitments (Soare, 2024). However, this prioritisation of non-EU defence suppliers has further marginalised Romania's domestic industry, limiting opportunities for technology transfers, industrial partnerships, and long-term

European capability-building (Csernaton, 2024).

Beyond procurement preferences, institutional fragmentation and a lack of strategic planning have further weakened Romania's participation in EDF-funded projects. While France, Germany, Italy, and Spain have developed dedicated institutional frameworks to align their national defence priorities with EDF objectives, Romania has struggled to establish a coordinated mechanism to facilitate EDF participation. The lack of structured collaboration between the Ministry of National Defence, the Ministry of Economy, academia, and key defence industry stakeholders has resulted in missed opportunities to access EDF funding and integrate into multinational consortia.

The first three years of EDF implementation (2021-2023) provide concrete evidence of Romania's peripheral role within the European defence-industrial landscape. Data from the Foundation for Strategic Research, the European Commission's Directorate-General for Defence Industry and Space (DG DEFIS), and the European Defence Agency (EDA) indicate clear disparities in participation among EU member states (Masson, 2024). The total EDF budget allocated for 157 projects during this period amounted to €3,135 million, with €1,167 million in 2021, €832 million in 2022, and €1,136 million in 2023. However, Romania's EDF funding share remained below 0.5% in both 2021 and 2022, revealing alarmingly low financial absorption. By contrast, France received 22% of total EDF funding in 2021 and 19% in 2022, Germany 16% in both years, Italy 15% and 14%, and Spain 15% and 13%.

Romania's limited leadership roles within EDF consortia further reinforce its marginal presence. Of the 157 projects initiated between 2021 and 2023, only one project, AVALON, is led by a Romanian entity, an SME specialising in underwater wireless optical communication technology. While a remarkable achievement, AVALON

remains an isolated case rather than an indication of broader national engagement. The AVALON consortium includes 14 organisations from nine countries, with a total budget of €3.99 million, representing just 0.12% of the entire EDF budget over three years. Moreover, no other Romanian partners are involved in the project, exposing directly a lack of national networking and coordination within Romania's defence research and industry sector. By contrast, 40 EDF consortia are led by French entities, 28 by Spanish entities, 17 by Greek entities, and 16 by Italian entities, collectively accounting for 65% of all EDF-funded projects.

A meticulous inspection of EDF's leading beneficiaries further reinforces the dominance of a small group of European defence giants. Among the most successful participants in leadership roles, THALES (France) leads with 12 projects, followed by AIRBUS (France and Germany) with 8 projects. When considering the total number of participations across both leadership and partner roles, THALES GROUP leads with 111 participations, followed by LEONARDO with 65, AIRBUS with 53, INDRA SISTEMAS with 41, and RHEINMETALL with 35.

Compared to leading EU states, Romania's overall presence within EDF consortia remains marginal. Romanian public and private entities account for only 30 participations out of a total of 2,318 across all EU member states and EDF projects, representing a mere 1.3% of total EDF involvement. By comparison, France and Italy each hold 14% of all participations, while Germany and Spain account for 12% each, positioning them as central actors within the EDF framework. A closer examination of Romania's integration into EDF-funded consortia reveals its limited role in projects led by leading EU countries, with 1.72% in French-led projects, 0.81% in Spanish-led projects, 1.08% in Italian-led projects, 3.20% in German-led projects, and 0% in Greek-led projects. These figures

illustrate Romania's minimal presence in strategic collaborations and its struggle to secure meaningful roles within European defence networks. In stark contrast, other EU member states have strategically positioned their defence industries within multinational frameworks, leveraging EDF participation to enhance their industrial capabilities and expand their influence across the European defence ecosystem.

Additionally, a sector-specific assessment of Romania's involvement in EDF-funded projects further underscores its misalignment with EU defence priorities. Of total project participations, only six are in conventional combat and warfare domains, while 20 projects focus on non-combat areas, such as space, cyber, information systems, digital transformation, materials, components, and energy. This imbalance suggests that Romania has not effectively positioned itself within the EDF's key investment areas related to combat readiness and high-end military capabilities, which are directly linked to the broader defence social mission.

This lack of relevance and integration is not merely a result of financial constraints but reflects broader industrial shortcomings and the absence of a coherent strategy for technological cooperation. Furthermore, Romania has demonstrated inconsistent technological diplomacy and a limited history of success in securing high-value EDF projects. Other EU states have leveraged EDF participation to strengthen their industrial capabilities and expand their strategic influence, including through the appointment of technology ambassadors in Brussels to advocate for national defence industries and research institutions.

These findings suggest that Romania's low engagement in EDF is not merely a result of limited funding allocation but a structural issue tied to weak industrial participation, lack of strategic positioning, and institutional fragmentation. Without a clear policy shift, improved defence-industrial coordination, and a more proactive approach to securing

EDF leadership roles, Romania risks remaining at the margins of European defence integration. The data highlights a deeply entrenched gap between Romania's formal support for EU defence cooperation and its practical ability to leverage these initiatives to strengthen its military-industrial base.

4. Conclusions

The current phase of the European Defence Fund's implementation provides an empirical basis for assessing the evolving dynamics of EU defence integration. The fund has played a pivotal role in shaping the European defence landscape by strengthening cooperation among member states, enhancing industrial competitiveness, and laying the groundwork for a more autonomous and effective European defence union. However, data suggest that despite these ambitions, the EDF continues to face structural constraints, including imbalances in funding distribution, a high concentration of projects among a small number of dominant defence industries, and the limited engagement or strategic marginalisation of less industrially developed member states, such as Romania.

Romania's limited engagement in the EDF reflects a deeper structural misalignment between its national security interests, national defence-industrial policy and the broader European defence agenda. While the country formally endorses EU security and defence integration, its actual participation remains peripheral, with a marginal financial absorption rate, a lack of leadership roles in EDF-funded projects, and minimal presence in multinational consortia. This weak integration stems from several interrelated factors, including Romania's preference for government-to-government (G2G) procurement arrangements with non-EU suppliers, particularly the United States, its underdeveloped defence-research-industrial ecosystem, and its fragmented institutional approach to European defence initiatives. This reluctance to fully embrace EU

mechanisms for defence-industrial cooperation has resulted in missed opportunities, with Romania failing to leverage the EDF as a political and financial tool for modernising its domestic defence industry and strengthening its position within the EU defence market.

Moreover, the disproportionate concentration of EDF funding among a handful of member states, primarily France, Germany, Italy, and Spain, raises important questions about the fund's long-term capacity to achieve truly inclusive European defence integration. The EDF's competitive nature, with only 30% of proposals receiving funding, further reinforces the necessity for well-structured institutional frameworks at the national level to maximise participation. Romania's low presence in EDF consortia, particularly in high-value combat and warfare capability development projects, suggests a failure to position itself strategically within these emerging networks.

Looking ahead, Romania's ability to enhance its role in the EDF will depend on several key policy adjustments. First, the establishment of a centralised national mechanism dedicated to European initiatives participation, including EDF, is imperative to streamline inter-agency coordination between the Ministry of National Defence, the

Ministry of Economy, the Ministry of Research, academia, NGOs and defence industry stakeholders. Second, targeted investments in research and innovation, particularly through greater integration of academia and the private sector into EDF projects, could help bridge the existing capability gap. Third, a shift in procurement strategies, moving beyond reliance on off-the-shelf acquisitions from non-EU suppliers to increased participation in European collaborative projects, could position Romania as a more influential political player in EU defence-industrial cooperation.

Ultimately, the EDF represents both an opportunity and a challenge for Romania. If the country continues to underutilise this mechanism, it risks entrenching its status as a peripheral actor in European defence integration. Conversely, by implementing the necessary structural and strategic reforms, Romania could not only strengthen its domestic defence capabilities but also play a more meaningful role in shaping the future of European security and defence policy. The next years of EDF implementation will serve as a crucial test of Romania's ability to transition from a passive beneficiary of EU security initiatives to an active contributor in the evolution of Europe's defence-industrial landscape.

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