Istituto Affari Internazionali

The Italian German Action Plan and Its Consequences over Industry and Defence

by Federico Castiglioni

Hanns Seidel Stiftung

ABSTRACT

The Italian-German Strategic Dialogue (IGSD) is a forum for discussion and exchange between think tanks, diplomats, businesses and academics from Germany and Italy. The first session, held in Rome in November 2022, discussed the possibility of a formal agreement between Italy and Germany set to expand the existing bilateral collaboration. Exactly one year later, the Italian and German governments adopted a collaborative action plan that specifically addresses both bilateral and European matters. The Action Plan embraces issues such as commercial competitiveness, defence, the green economy and cultural protection. Furthermore, this agreement supports talks between Italian and German think tanks on key bilateral issues, promoting regular gatherings among private and public stakeholders. The second edition of the Italian-German Strategic Dialogue was held in Berlin in January 2024 and focused mostly on the economic and defence sectors, as the Action Plan sets the path for increased ambition in both areas. The roundtable was organised by the Stiftung Wissenschaft und Politik (SWP), in collaboration with the Istituto Affari Internazionali (IAI) and the Hanns Seidel Stiftung (HSS). The event was attended by notable Italian and German industry representatives, as well as high-ranking civil servants and military officers.

Italian foreign policy | *German foreign policy* | *Defence industry*

keywords

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by Federico Castiglioni*

1. Strategic outlook

Only collaborative efforts between Italy and Germany can effectively resolve the shared obstacles that the two countries will face in 2024. The next European elections will lay the groundwork for a revised Multiannual Financial Framework which will have to align the next budgetary priorities with the current challenges confronting the EU. The imperative to protect Ukraine and support its economy now rests with Europeans. This responsibility will be challenging, and the EU member states must make structural decisions to ensure that assistance to Ukrainians becomes a permanent part of the Union budget. Ukraine urgently requires weaponry and defence systems, and no individual country is capable alone of supplying them at an appropriate level, particularly given the current delay in US aid and Ukraine's tremendous operational needs. Europe must bolster its domestic industry and strive for maximum self-sufficiency to effectively address Russia's security challenge, even if this means reconciling a shared European industrial strategy with internal competitiveness.[1]

To achieve this objective, the bloc must enhance its level of interconnectivity and support its industry by establishing a robust network of energy connections. The network should also be influenced by a broadening of energy sources, and the implementation of the Italian "Mattei Plan for Africa" could be beneficial in achieving this goal. The shared objectives of both countries necessitate a higher

[1] Paolo Guerrieri and Pier Carlo Padoan, "'European Competitiveness and Strategic Autonomy'. The European Union and the Double Challenge: Strengthening Competitiveness and Enhancing Economic Security", in *LEAP Working Papers*, No. 5/2024 (28 February 2024), https://leap.luiss.it/?p=3718.

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Report of the second edition of the Italian-German Strategic Dialogue (IGSD), organised in January 2024 by the Istituto Affari Internazionali (IAI), the Stiftung Wissenschaft und Politik (SWP) and the Hanns Seidel Stiftung (HSS), in strategic partnership with Fondazione Compagnia di San Paolo. This paper does not necessarily and exclusively report the opinion of the organising institutions.

DOCUMENTI IAI 24 | 05 - APRIL 2024 ISSN 2280-6164

level of mutual communication and adaptability. The German government could demonstrate this flexibility in areas such as migration, while the Italian government should work to reconcile its strategic priorities, including economic growth and support for Ukraine, with a beneficial financial responsibility. In any case, the two countries, among the biggest EU economies, will need a high degree of political coordination to successfully deliver a credible EU agenda both domestically and abroad.

2. Economic security and industrial cooperation

In the Action plan, Italy and Germany openly deal with the idea of "economic security", particularly in the industrial domain.[2] The term "economic security" is difficult to express without conveying a negative tone and emphasising the terminology's apparent exclusivity. However, the two countries and the EU define this notion as a positive endeavour to protect economic progress and stability from potential external threats in today's global politics.[3] From the onset, the economic integration process in Europe originated as a geoeconomic endeavour with the objective of promoting peaceful exchanges among its members and establishing a functional single market. As such, it would entail a certain degree of economic security, specifically referring to the capacity of an economy to function amidst significant geopolitical emergencies. Similar to the establishment of the coal and steel community during the initial EU integration process, the sectors that economic security should currently prioritise are energy (and especially hydrogen-based technologies) and cutting-edge industries.

The European member states and EU institutions' main priority is still following the imperative to maintain, despite the odds, an open global market. However, to accomplish this objective and make it politically sustainable, it is nonetheless necessary to at least diversify the sources of imports for strategic components that contribute to the EU economy, and thereby avoid undue influences on EU foreign policy. The European Union's single market faces competition from global economic opponents who often display illiberal tendencies; the new international landscape requires increased public and private investments in advanced technology, as well as a reduced dependence on external actors who might use trade to weaken democratic regimes.[4] Projects such as the Global Gateway, which

[2] Germany and Italy, *Piano di Azione italo-tedesco per la cooperazione strategica bilaterale e nell'Unione europea* [Action Plan to strengthen cooperation at both bilateral and European level], 22 November 2023, p. 22, https://www.governo.it/en/node/24362; *Deutsch-italienischer Aktionsplan für strategische Zusammenarbeit auf bilateraler und EU-Ebene*, https://www.bundesregierung.de/resource/blob/975228/2244468/dc5441c1b7497c5855a723c87ffbf3a8/2023-11-22-dtitaktionsplan-data.pdf.

[3] European Commission, *Commission Proposed New Initiatives to Strengthen Economic Security*, 24 January 2024, https://ec.europa.eu/commission/presscorner/detail/en/IP_24_363.

[4] Spain's National Office of Foresight and Strategy, Resilient EU2030, September 2023, https://futuros.gob.es/sites/default/files/2023-09/RESILIENTEU2030.pdf.

DOCUMENTI IAI 24 | 05 - APRIL 2024 ISSN 2280-6164

aims to enhance global interconnectivity, in the current EU predicament cannot help but meet the political priorities of diversification and de-risking set out by the bloc.[5]

For Italian and German policymakers, the moral hazard created by the entanglement between foreign policy and the economy is not always easy to comprehend and unravel. In the contemporary world, there are a variety of economic instruments to accomplish non-economic objectives and political instruments to achieve economic objectives. As a result, these two domains are closely interconnected, and the European Union is not the sole entity grappling with the challenge of reconciling economic growth with geopolitical considerations. In a globalised society, and this was previously recognised in other regions before becoming visible in Europe as well, the exchange of products involves, to a certain degree, an exchange of sovereignty. After the Russian invasion of Ukraine, the EU realised the extent of this entanglement when it imposed a wave of sanctions on Russia, which increased the cost of waging the war for the aggressor by undermining its economic foundations. While crippling Russia, the sanctions obviously had consequences also in Europe and both Italy and Germany appear ill-equipped to fully understand the dynamics and stakes of the undergoing conflict.[6] The lack of relevant data is the primary limitation to comprehensively understanding the economic aspects of current warfare. In order to strengthen its position as a geopolitical actor, the EU requires comprehensive data on numerous aspects of its industry, such as supply chains, geopolitical bottlenecks and foundational enablers (e.g., technology and raw material requirements for EU product manufacturing). This data is crucial for forecasting the consequences of escalations at several global flashpoints.[7]

In this regard, both the European Union and its individual member states are falling behind, and neither has undertaken a thorough examination or evaluation of these critical matters. Consequently, policymakers encounter a substantial degree of unpredictability with respect to the possible repercussions of their decisions. A second concern pertains to the lack of a well-defined strategic trajectory. EU member states seem reluctant to strategically approach foreign trade, whereas nations with a high degree of central planning or rising economic protectionism openly display such a proclivity. For example, China has shifted its attention from exporting cheap commodities to the Western market to prioritising high tech products and raw materials,[8] while the United States is implementing import

[5] Andreea Brinza et al., "EU-China Relations: De-risking or De-coupling – The Future of the EU Strategy towards China", in *European Parliament Studies*, March 2024, https://www.europarl.europa.eu/thinktank/en/document/EXPO_STU(2024)754446.

[6] Centro Studi Confindustria, *The Italian Economy at the Test of the Conflict in Ukraine*, Spring 2022, https://www.confindustria.it/home/centro-studi/temi-di-ricerca/congiuntura-e-previsioni/dettaglio/rapporto-previsione-economia-italiana-primavera-2022.

[7] European Commission, *Towards a Common European Data Space* (COM/2018/232), 25 April 2018, https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52018DC0232.

[8] Eurostat, *EU Trade in High-Tech Products up in 2022*, 10 May 2023, https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20230510-2.

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reductions via the "Build America, Buy America" act.[9] Italy and Germany, as major manufacture countries, must coordinate their efforts and reconcile the external dimension with the domestic EU-wide policies, with the green transition being the most significant challenge.

3. Paving the way on defence

For three decades, in most European countries defence investment has trailed behind the rest of the globe. The tendency began after the Cold war ended, when the absence of the Soviet menace prompted NATO European members to lower their defence spending. Europe, buoyed by its advantageous geographical position and technological superiority over its neighbouring regions, allocated limited resources to military R&D, prioritising domains designed for external projection (e.g., air force, light land forces) while ignoring heavy forces for peer-to-peer conflicts (e.g., heavy brigades in the army, air and missile defence). This lack of defence spending was probably expedited by the understatement of the Russian threat.[10] In addition to a shortage of funding, most European forces went through staff cutbacks, accompanied by insufficient procurement and military exercises. This trend begun to reverse after 2014 Russia's invasion of Crimea, but only the war in Ukraine started in February 2022 made a watershed in terms of military budget uplift.[11] For the first time, Europe recognised that it was not ready to contain the Russian aggression by an adequate transfer of weaponry to Ukraine. In this war scenario, we are witnessing two opposite trends, something not uncommon in military history. The first tendency is to experiment extensively new technologies, like drones and hypersonic missiles, to see how their impacts may be maximised. The second is to mass produce equipment – not necessarily updated – to overcome the opponent with sheer firepower and combat mass.[12]

In both fields, experts deem Europe to be unprepared. The EU, and especially countries such as Italy, France and Germany, are struggling to secure a sufficient production of defence systems and to work jointly with their industry at the speed that wartime would require. To the end of strengthening the scale of European military production, there are still political obstacles to overcome, primarily because public opinion in the EU is grappling with this reality and is understandably wary of the new security environment in which the world finds itself.[13] Each member

[9] US Congress, *Infrastructure Investment and Jobs Act, Title IX: Build America, Buy America*, Washington, 15 November 2021, https://www.commerce.gov/oam/build-america-buy-america.

[10] Hugo Meijer and Stephen G. Brooks, "Illusions of Autonomy: Why Europe Cannot Provide for Its Security If the United States Pulls Back", in *International Security*, Vol. 45, No. 4 (Spring 2021), p. 7-43, https://doi.org/10.1162/isec_a_00405.

[11] NATO, *Defence Expenditure of NATO Countries (2014-2023)*, 14 March 2024, https://www.nato.int/cps/en/natohq/news_223304.htm.

[12] Stephen Biddle, "Back in the Trenches", in *Foreign Affairs*, Vol. 102, No. 5 (September/October 2023), p. 153-164.

[13] European Parliament, *Public Opinion on Russia's War against Ukraine*, 23 February 2024, https://

DOCUMENTI IAI 24 | 05 - APRIL 2024 ISSN 2280-6164

state views public awareness and military preparedness differently; Poland, Central Eastern Europe and Scandinavia have higher levels of public awareness and readiness, whereas Italy and Germany have lower ones.[14] The Italian-German action plan recognises defence as a vital area of bilateral cooperation for the reasons stated above. However, the combined efforts of the two countries remain insufficient in delivering help to Ukraine, and the hurdles are complicated by a new industrial landscape in which private equity and private actors play a greater role than in the previous century (as demonstrated by the Starlink case).[15] The two pressing issues that both Berlin and Rome must address are the replenishment of the national military stocks, which have been depleted by the two countries support for Ukraine, and new investments in military technologies, particularly in rapidly evolving sectors such as artificial intelligence and missiles, as well as traditional sectors that have been neglected for decades, such as infantry and armoured vehicles.[16]

While Europe may provide coordination, facilitation and economic incentives as demonstrated by European Peace Facility (EPF) and other initiatives for ammunition and joint procurement, the principal source of funding is expected to be the member states' budgets. The two imperatives of research and procurement must work together; however, because of the ongoing conflict, and the lengthy time required for R&D to improve technology or update legacy assets, the two countries' primary focus should be on procurement, which will also benefit Ukraine. Unfortunately, the need to speed up procurement processes very often leads to externalisation and off-the-shelf solutions for the European armed forces.[17] The massive order of equipment from foreign nations, such as the United States and Korea, is expected to further jeopardise European defence technological and industrial base (EDTIB), and will likely undermine interoperability. While the trade-off between procurement urgency and the achievement of an EU strategic autonomy should not be overlooked, the common instruments at the disposal of the member states are insufficient to avoid this outcome. The Commission and the Council seem aware of the challenge and are struggling to face it timely.

Over the last years, different instruments have been devised to provide the EU member states with an updated common defence framework. The European Defence Fund (EDF) is a crucial mechanism for the advancement of new military systems

www.europarl.europa.eu/at-your-service/en/be-heard/eurobarometer/public-opinion-on-the-war-in-ukraine.

[14] Ibid. For Italy see also Ipsos website: *Russia-Ucraina, le ultime news e sondaggi: opinioni degli italiani*, https://www.ipsos.com/it-it/node/883216.

[15] Nick Paton Walsh et al., "Ukraine Relies on Starlink for Its Drone War. Russia Appears to Be Bypassing Sanctions to Use the Devices Too", in *CNN*, 26 March 2024, https://edition.cnn.com/2024/03/25/europe/ukraine-starlink-drones-russia-intl-cmd/index.html.

[16] Alessandro Marrone and Ester Sabatino, "Main Battle Tanks, Europe and the Implications for Italy", in *Documenti IAI*, No. 20|07 (April 2020), https://www.iai.it/en/node/11536.

[17] Alessandro Marrone (ed.), *Russia-Ukraine War's Strategic Implications*, Rome, IAI, February 2024, https://www.iai.it/en/node/18118.

produced within Europe. However, it is restricted to focusing solely on long-term collaborative technological innovation. The European Defence Industrial Strategy (EDIS) and its investment programme aim at creating a new set of opportunities for EU enterprises – and common objectives for the EU governments are yet in a process of activation.[18] In the meanwhile, previous agencies, like the European Defence Agency, which were never sufficiently operationalised, are ineffective to address the new security environment and therefore need to be reformed. The reorganisation process will require a significant amount of time. Consequently, the armed forces of the European Union member states will need to face the task independently, with limited support from initiatives like the EPF and the EDF.

Conclusions

The Italian-German action plan is an important milestone in developing a European strategy to address the war in Ukraine and the challenges posed by a more unstable world order. Evidently, this bilateral effort entails the development of a similar strategic approach in different realms, always driven by alike security assumptions. In the industrial domain, the Italian-German partnership is stronger than ever today, and the cooperation between the two economies, as in the past, drives forward wealth and innovation in Europe. Italy and Germany have solid enterprises, represented by important and renowned organisations such as Confindustria and BDI, which act as *trait d'union* between private actors and policymakers. However, this long lasting and successful cooperation is now exposed to new threats that should be jointly addressed. The two nations should prioritise tracking their respective industrial supply chains to diversify risks, minimise bottlenecks and avoid dependence on monopoly suppliers. In this field, the EU provides good guidelines, which are though uneasy to follow due to the lack of information and scarcity of world suppliers (e.g. in technology and raw materials).

Furthermore, a difficulty that Italy and Germany should overcome is the reconciliation between the energy transition – which will be the biggest public investment in the next few years – and the strategic outlook that is now required for procurement. In both countries, and all over Europe, the two revolutions, green and digital, should be read through the prism of security, looking beyond the paradigm of globalisation without geopolitical consequences.[19] The odds are even more striking in the defence field. In this domain, the urgency to support Ukraine clashes with the aforementioned guidelines, and is driving Italy and Germany to resort increasingly to external procurement, thereby undermining the EDTIB

[18] European Commission, *A New European Defence Industrial Strategy: Achieving EU Readiness through a Responsive and Resilient European Defence Industry* (JOIN/2024/10), 5 March 2024, https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52024JC0010.

[19] Mario Damen, "EU Green Strategic Autonomy. The Challenge of Combining Two Objectives", in *EPRS Briefings*, September 2023, https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2023)747465.

DOCUMENTI IAI 24 | 05 - APRIL 2024 ISSN 2280-6164

and potentially creating new dependencies, which should now be mitigated. The current developments in the defence sector showcase the potential repercussions of a conflict on the European economy: when the imperative to resolve an emergency mismatches some policy objectives, one of the two priorities suffers a setback. The solution to this conundrum lies in a more streamlined and targeted collaboration, such as the one demonstrated by the Action Plan, and a major involvement of the first-tier companies.

The collaboration between Italy and Germany in various specific projects mentioned in the Action Plan, such as those in the land and electronic sectors, should serve as a driving force for the political efforts leading to a more Europe-focused complementary approach. At the same time, European defence businesses like Leonardo, Rheinmetall, Fincantieri and KNDS, which are leaders in their respective domains and are currently investing to keep the edge, can play a crucial role in fostering collaboration between public authorities and private stakeholders. The bilateral cooperation between Italy and Germany, which have similar supply chains, connected economies and almost identical objectives in foreign policy, is therefore one of the key enablers for a more strategic EU outlook.

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24 | 05	Federico Castiglioni, *The Italian German Action Plan and Its Consequences over Industry and Defence*
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