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14 empty airframes: public–private relations in the Swedish arms industry

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Abstract

In February 2013, the Swedish Defense Materiel Administration ordered 14 empty airframes in an effort to keep production lines open at the national arms producer Saab. This unusual example of state support is a reflection of the tight-knit relationship between state actors and the arms industry in Sweden. This article provides a case study of the political and economic factors that contributed to the order. It analyses the Swedish history of armed neutrality and military non-alignment as a driver of contemporary procurement and arms trade policies, and the formation of a "partially captive" Swedish arms market—where orders to Saab made up 60 percent of the Swedish arms procurement budget in 2018.

In April 2019, Swedish media revealed to the public that the Swedish Defense Materiel Administration (FMV) had ordered 14 extra airframes in addition to 60 new Jas Gripen E multifighter jets from Swedish arms producer Saab. The airframes were for previous versions of the fighter jet (C/D) and there was no plan to order the rest of the necessary parts. According to the FMV, the order was motivated solely by Saab's need to keep production lines open. Such state interventions in support of a national company are not regular events in Swedish state procurement, an area strictly regulated to safeguard the proper use of taxes and a free market within the European Union. This case of the empty airframes order illustrates the closeness of the state and arms industry relations in Sweden.[1]

As a self-proclaimed "humanitarian superpower", as well as a relatively large arms exporter, Sweden's arms trade policy is a combination of highly conflicting interests. In 2018, the Swedish government was the first to include a democracy criterion in its national arms trade regulation and has tried to influence the European Union to do the same. However, the Swedish government also gives extensive support to national arms production and arms trade—including arms exports to countries involved in armed conflicts and countries that have substantial democracy deficits and poor human rights records.[2]

This article provides a case study of the relationship between the state and the arms industry in Sweden, to see how it has led to such an unusual example of state support. It asks what the airframes order tells us about Swedish state–Saab relations, the mechanisms of the global arms market, and assesses the importance of Saab's economic influence on, and codependency with, the Swedish state. It considers the development of the Swedish neutrality policy, its arms trade and military procurement policy, and how Saab achieved its dominant position. Finally, the consequences of the close relationship between state and economy, and the effects of this partially captive arms market are considered.

Political background: Neutrality, independence and arms trade

The Swedish policy of "non-participation in alliances in peacetime with a view to neutrality in war" was formally adapted after the second world war and became an important marker of Swedish politics and identity for decades to come. In order to retain the ability to declare itself neutral in times of war, the official line was that Sweden had to remain outside of all political alliances

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and to become self-reliant on all military equipment for the armed forces—or at least credibly appear to be. This image of an impartial and independent Sweden was the justification to create a large and broad arms industry that became an integral part of Swedish "armed neutrality". It is of note that, among the countries taking a neutral path after the second world war, only Sweden made efforts to develop an autonomous arms industry. Allowing for arms exports made it possible to cover the gap between the arms industry's output and the demand from the armed forces, while allowing for economies of scale in production. In the early 2000s, the neutrality policy was gradually remolded into a declaration of military non-alignment.[3]

Swedish national regulation imposes a general ban on all arms exports from Sweden with all approved exports being exceptions to this principle. Despite this, over the period 2014–2018 Sweden was the 15th largest exporter of major conventional arms and Swedish arms sales in 2019 were five times the size of those at the beginning of the 2000s. Over time, an increasing number of buyer countries have been approved; in 1990 Sweden exported arms to 33 countries, by 2018 this had risen to 63. In 1997, exports accounted for 25 percent of Swedish arms production, compared to around 50 percent in 2018.[4]

It is questionable as to what degree having a large arms industry enabled Sweden to be independent and to what extent it can provide independence today. First, Sweden has never been fully self-sufficient in arms. Second, its arms exports have made Sweden a contributor to armed conflicts all around the world. A comparison of Swedish arms exports in the period 2000–2015 with data from the Uppsala Conflict Data Program (UCDP) showed that on average 34 percent of Swedish arms exports went to countries involved in armed conflict. In 2015, this included Algeria, India, Pakistan, Thailand, Turkey, and the United States. According to calculations by the Swedish Peace and Arbitration Society, 29 percent of the value of the Swedish arms trade in 2019 went to countries that were unfree or partly unfree (according to Freedom House's assessment of the state of political and civil rights around the world). Over the period 2014-2018, Sweden's biggest clients were Saudi Arabia, the United Arab Emirates, and Algeria, all countries criticized for serious human rights violations. Third, the internationalization of the arms industry in terms of ownership as well as the systems themselves, has made the argument for independence increasingly difficult. One example of this is the Jas Gripen E multifighter jet, which consists of 50–60 percent international parts, mainly from Italy, Germany, the United States, France, and the United Kingdom.[5]

The empty airframes order highlights the Swedish state-support of the domestic arms industry. Various political and economic factors have contributed to the formation of, what is now, a "partially captive" Swedish arms market. This industry support, leading to increasing arms exports, is however in clear contradiction with Sweden's ambitions in other policy areas.

Nonetheless, the paradigm of Swedish armed neutrality lives on. In the annual parliamentary debate on Swedish arms exports in June 2019, representatives from the three biggest political parties (the center-left Social Democrats, the conservative Moderate Party, and the nationalist Sweden Democrats) all argued that the arms trade provided independence and military non-alliance.[6]

The Swedish defense industry and vital security interests

Of EU states, Sweden still has one of the largest military equipment procurement budgets as a proportion of defense spending, but is not among those spending the most on defense in general. It is argued that the historical focus on national arms production is an important factor in this situation; Sweden's defense industry remains relatively large compared to the size of its defense expenditure. Figure 1 shows that, of EU states reporting to the European Defence Agency (EDA) in 2016, only two states spent a larger defense budget proportion on procurement than Sweden (although many states are seen to be close behind).[7]

As orders from the Swedish armed forces diminished during the 1990s, the arms industry was fully privatized, opened to foreign ownership and to previously closed export markets. Since 2000, the Swedish state has not owned any part of the arms industry and there are no

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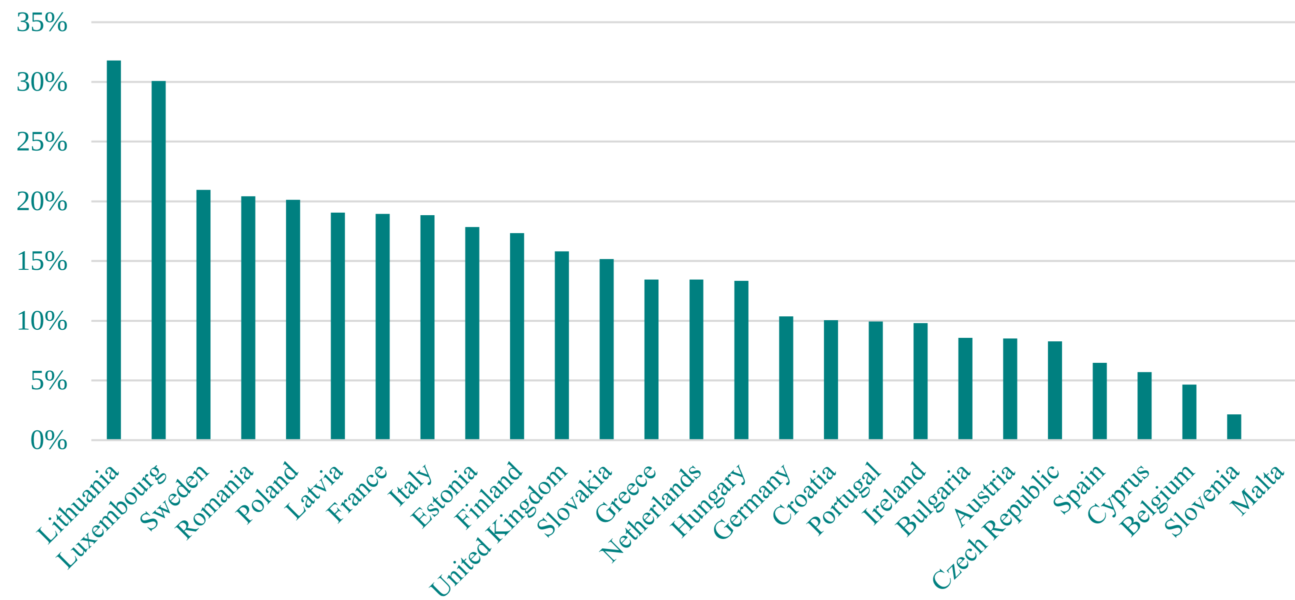

Figure 1: Procurement of military equipment as part of total defense expenditure 2016.
Source: Author's calculations based on the European Defence Agency's aggregated and national defense data (EDA, 2019).

"golden shares" or other official systems for state influence. However, the traditional Swedish arms industry model focused, rather than on ownership, first and foremost on the Swedish state overseeing and funding research, development, production, and procurement. Even though the relationship saw changes after the cold war, joint state–industry development continued to be the norm. In 2007, a significant step away from this traditional view was taken with a new military procurement strategy. From this time, military upgrade choices were to be prioritized as, first, to upgrade and sustain, second to procure equipment already on the market and then, only if the first two alternatives were not available, to develop new equipment.[8]

However, since then, a couple of notable exceptions have been introduced to this policy. Fighter jet and underwater capabilities have been declared so important that the state ought to invest in maintaining know-how and production in Sweden. This in-country position was to be held even if cheaper (and perhaps superior) products were already available on the international market. Other areas that have been mentioned are sensors, electronic warfare, and cryptography. Classifying a capability as a "vital security interest" also makes it possible for arms producing EU states to exempt it from the EU regulation on procurement, which has competition as its main principle. This exception made the airframes order possible simply by classifying the project as providing a "vital security interest" capability.[9]

When the Jas Gripen E order was being finalized in 2012–2013, Saab had almost completed the production of version C/D to the Swedish armed forces as well as to export and leasing clients (including South Africa, the Czech Republic, Hungary, and Thailand). The order was the result of negotiations between the FMV and Saab in 2012, where alternatives were discussed on how to safeguard production and competence at Saab. The overall chain of events is described in the Parliamentary Advisory Study on Defense from 2019. The study discusses the cost of defining and supporting vital security interests and argues that the size of Swedish

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defense procurement is insufficient for the industry to retain its competence which, in turn, necessitates extra orders to be secured—through supplementary national orders or arms exports. According to the study, extra orders from the armed forces would result in equipment being replaced at a higher rate than necessary from a military standpoint. It can also result in an expansion of the armed forces or in orders aimed solely at maintaining industry production. The study concludes that the policy to support vital security interests could potentially amount to a "substantial financial commitment for the state".[10]

While the cost of the airframes has not been reported, it is estimated to several hundred million SEK, from a total order of SEK 37bn (USD 4bn). The connection between this order and Sweden's procurement strategy was highlighted when the Press Officer at the FMV defended the deal:[11]

> "The Gripen is a vital security interest for Sweden and it was important to keep production going and develop the ability".[12]

Saab is the only Swedish company to develop the two main "vital security interests" of fighter jets and underwater capabilities. In addition, it is a major player in sensors and electronic warfare. Saab therefore holds a special position in Swedish arms production, with no competition in many areas, and exhibits a lot of power and influence with government authorities and in the general political sphere. Saab is one of the "national champions" emerging from privatization, mergers and acquisitions in 1990s Western Europe. Today, it is the only Swedish company in SIPRI's list of the world's one hundred biggest arms exporting companies, ranking as 30th in 2018, with close to 70 percent of the total revenues of the Swedish arms industry. It is also the only Swedish-owned major domestic arms company. Arms sales represent 85 percent of its sales, with its business areas covering fighter jets, training aircrafts, ground combat weapons, missile systems, torpedoes, surveillance and C4I, submarines, and other underwater vessels.[13]

Arms markets are sometimes described as "captive" markets. Unlike a single-seller monopoly, where there is actually only one seller to choose from, in a captured market certain circumstances tie the buyer to one seller. The captured market is characterized by low competition and high barriers to entry. In Sweden's case, the circumstances that drive the partially captured arms market is the belief in national military security coupled with the idea that security depends on the upholding of national arms production. Buying from the global arms market could potentially offer lower prices and/or faster deliveries. This is, however, not possible without giving up on the idea of military independence through national arms production. Overcapacity in international arms production can create a buyer's market leaving procuring governments in a position to bargain, demanding, for example, extensive offset-deals and technology transfers in international arms deals. However, when selling to their own governments, dominant arms companies frequently have the upper hand. The fact that there are no other choices is a position that dominating arms companies can use to their advantage in negotiations with national governments.[14]

Saab's golden position

The Parliamentary Advisory Study on Defense in 2019 confirmed the monopoly power that Saab had gained. It found that the Swedish armed forces' exposure to Saab had increased during the last ten years, while Saab had in some areas become less dependent on the Swedish armed forces. In fact, determining Saab's share of procurement expenditure is not straightforward, as unlike other countries (such as the United Kingdom), there is no official data on Swedish military procurement at companies or contracts level. An estimate can be made by comparing the defense procurement budget with the information on large customers in Saab's annual reports. Figure 2 illustrates that Saab made up a substantial and generally increasing part of a relatively constant Swedish military procurement. We see an increase from 35 percent of the budget in 2009 to 65 percent in 2017 and 60 percent in 2018. By comparison, in 2018/19 the United Kingdom's privately owned BAE Systems had the largest share of the U.K. Ministry of Defence direct

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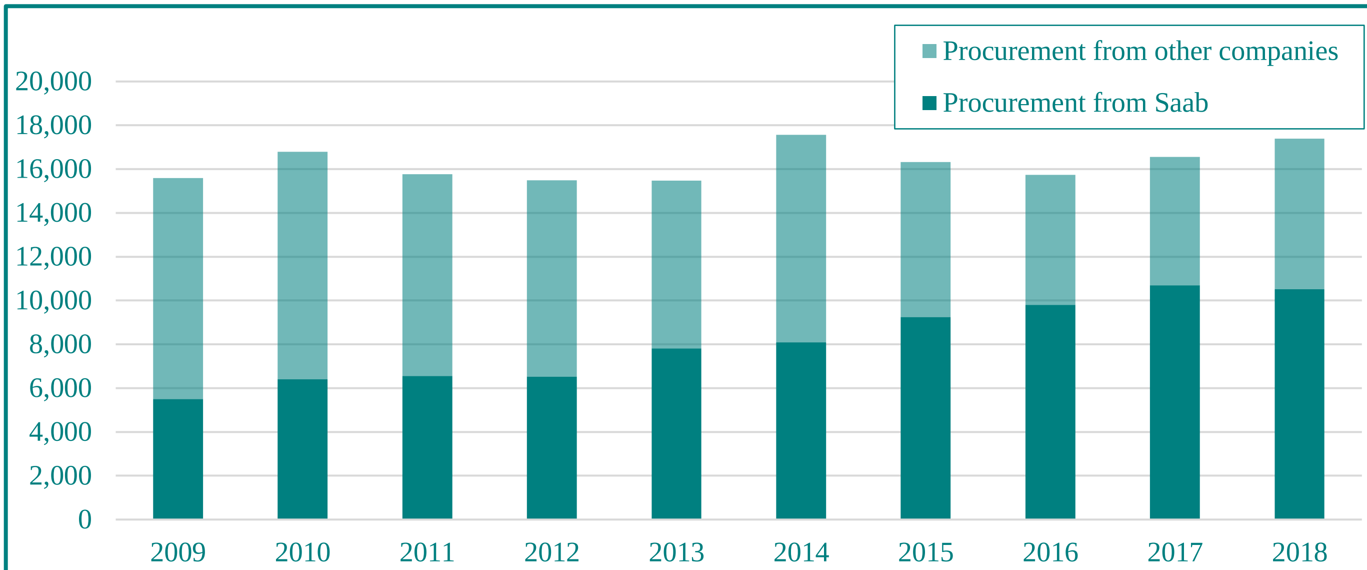

Figure 2: Procurement from Saab as part of total defense allocation for military equipment 2009–2018 (million Swedish Krona).
Sources: Saab annual reports 2009–2018. Swedish Ministry of Defense, appropriation directions for the Swedish armed forces 2009–2018.

procurement expenditure at under 14 percent. A list of future military procurement projects in Augustsson (2019c) is dominated by Saab projects, suggesting it is unlikely that its share of the procurement budget will decrease anytime soon.[15]

Saab's dominance is also evident in the armed forces' involvement in export promotion activities, such as participation in arms fairs. In 2019, 23 out of 26 approved applications for export support were for Saab activities. Due to the company's close political ties and active participation in export promotion, trade delegations, and lobby organizations, Saab has been described as a "political force". A look at the so-called "revolving door" between Saab and the political sphere, procurement, military, and PR firms focusing on defense, reveals many connections. For example, in recent years, within a year after leaving their positions, a former supreme commander of the armed forces had started working for Saab while a former minister for defense became partner of a PR firm connected to Saab.[16]

The consequences of support and dependency

Due to its competence in certain areas being defined as "vital security interests", Saab has clearly developed significant leverage in relation to the Swedish government. In this "partially captive" market, Saab's ability to make a profit, and so continue to exist as a company, has indirectly become a concern of the state. It would appear that Saab has, in part, come to be seen as a security asset rather than a private company. The environment in which the Swedish defense industry operates consists of a political paradigm of independence and military non-alliance (with its roots in the Swedish policy of armed neutrality). Political choices in procurement and arms trade are, in turn, influenced by the conditions of an oversized national arms industry acting in a global arms market with overcapacity. In this environment, a policy of state support is considered necessary to uphold national arms production—an oversized national arms industry requires state support to survive. In effect, the state support that is essential for arms exports to take place in a subsidized and crowded market becomes a factor pushing for further arms exports.

In the case of the airframes deal, the initial order created an incentive to provide even more state support

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to secure an export deal that would then justify the otherwise superfluous order. In the discussion that followed, having 14 airframes already produced when trying to sell Jas Gripen to other countries was framed as a competitive advantage by enabling faster deliveries. This fast-delivery competitive advantage case has been used by Saab as a sales pitch on several occasions.[17]

A disproportionate amount of power in the hands of one company, with the state as its main customer, is problematic because of the economic costs involved and the consequences for both arms exports and transparency. The Swedish procurement strategy, and the position it indirectly gives Saab, affects arms trade licensing. Safeguarding vital security interests can lead to arms export licenses being granted despite concerns about human rights, democracy, development, and the risk of armed conflict in buyer countries and regions—in clear conflict with Swedish ambitions in other policy areas.[18]

The interlinkage between arms companies and matters of national security can also hinder accountability and oversight. It is certain that the airframes order was not known to the Swedish parliament beforehand. The defense and security sector is ranked as one of the most corrupt in the world—with close relations between purchasing governments and industry actors being considered one of the built-in features that facilitate corruption. Such lack of transparency is also replicated in many importing states. Despite demands from civil society to include risk assessment for corruption in the Swedish regulation for arms trade, no such assessments are currently being undertaken. Between 2010 and 2019, 44 percent of arms exports from Sweden (in value terms) went to buyer countries with defense institutions at high, very high or critical risk of corruption.[19]

Independence from NATO is a core part of the official motivation behind Swedish arms industry support. There is, however, a contradiction between this official justification and the wider trend in Swedish defense and security policy. Although still far from NATO membership, since the end of the 1990s Sweden has moved closer to NATO through a variety of formal and informal collaborations. Besides the more officially stated motive of self-sufficiency, it is likely that national economic interests, such as keeping jobs in arms industry areas, are also drivers for industry support and arms trading. Without such other motives, there is a good case for increasing imports from the United States and other NATO countries in order to uphold Sweden's military forces.[20]

Conclusion

In the light of the close political and economic relation between the Swedish state and Saab, as well as the nature and state of the global arms market, it becomes unsurprising that an order could be made for extra military equipment connected to the Jas Gripen program. This kind of support resulted from several political and economic factors at play, and so provides an example of the costs of maintaining national arms production.

The Swedish state-arms industry relationship has been a subject of recent debate in Sweden, with a new military procurement strategy to be developed in 2020 to replace that of 2007. A new strategy could potentially result in increased formal state control of the industry, but it seems unlikely that government support will diminish. An oversight of the vital security interests has been suggested as part of this strategy and, given the apparent advantages of having a company product defined as a "vital security interest", it is perhaps not surprising that there has been a push for more capabilities to be included in this definition.[21]

In 2016, when asked to describe the relationship between the Swedish state and Saab, the official in charge of state support to the arms industry at the FMV said that it was "like a parent caring for its child". The official went on to say that the FMV cares for and creates an independent individual that, with support, can stand on its own and interact with others—rather than constantly having to be fed orders from the Swedish armed forces like before. The analysis in this article suggests that the Swedish government's relationship to Saab is more that of a parent caring for a fully grown adult, still living at home in order to sustain a lifestyle they could never afford on their own, with the parents

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convinced that they are the dependent parties in the arrangement.[22]

In the debate on Swedish arms industry and arms trade, the focus on Saab's role in national defense capability often overshadows the fact that Saab is a fully private and profit-making company—albeit one with a golden position that blurs the line between private and public. This substantially impedes efforts for more restrictive arms trade assessments, despite public concern regarding the gap between the Swedish peaceful image and its arms trade practice.[23]

Notes

1. Media reports and order: Augustsson (2019a). Motivation: Augustsson (2019a); FMV (2020c). Procurement: Upphandlingsmyndigheten (2020).
2. Humanitarian superpower: Swedish government (2013, p. 10). Influencing the EU: Lindell (2020).
3. Neutrality policy: Goldman (1991, p. 123). Identity: Stenlås (2010, pp. 8–9). Self-sufficiency: Karlsson (2015, pp. 13–15, 68); Davis (2002, p. 186). Credibility: Goldman (1991, pp. 123–124). Impartiality: Stenlås (2010, pp. 62–63, 84.); Hagelin (1990, p. 37). Solution: Karlsson (2015, p. 14). Remolding: Tepe (2007).
4. Ban: Swedish government (2017/2018:23, pp. 25, 29–30). While not specifically written into the Military Equipment Act or the Military Equipment Regulation, the general ban is clearly stated in the government bill presenting the most recent changes to the regulation, confirming a stance taken in previous government bills that all approved licenses are to be seen as exceptions to the general ban. 15th largest exporter: SIPRI (2019). Increase: Svenska Freds (2019). Buyer countries: More products have been put on the control list; this probably also has an effect on this increase. Comparison: Åkerström (2018, p. 29); Swedish government (2019, p. 5). Export percentage: 1997: KEX (2015a, p. 199); 2018: Swedish government (2019, p. 79).
5. Self-sufficiency: Hagelin (1990, p. 38). Armed conflicts: Hagelin (1990, p. 51); Åkerström (2018, pp. 21; 136–138). Armed conflict: Delling and Kudo (2016). See also: Åkerström (2018, p. 135). Calculations on unfree and partly unfree: Svenska Freds (2019) using data from Freedom House (2020). Buyer countries: Wezeman *et al.* (2019, p. 2). Critique: e.g., Human Rights Watch (2020, pp. 487, 586, 22). Internationalization: Olsson (2019, p. 8). Jas Gripen E: FMV (2020a).
6. Swedish parliament (2019, pp. 60–61, 70).
7. Procurement: James and Teichler (2014, p. 133). Ranking: Olsson (2019, p. 8). Comparative share: Author's calculations based on EDA (2019). Figure 1 source: EDA (2019)
8. Privatization: Bérau-Sudreau (2017, p. 27). State ownership: The government agency in charge of export controls can demand that board members are Swedish citizens and residents. Government approval is needed to sell an arms company to a foreign buyer. Oversight: Larsson (2019, p. 141). Joint development: Larsson (2019, p. 148–149). Strategy: Försvarsmakten (2007).
9. Exceptions: Försvarsberedningen (2019, p. 266). The term "capabilities" is broad and can include more than just the system itself. Regulation: EU (2009).
10. Negotiations: FMV (2020c). Orders: Försvarsberedningen (2019, p. 258); Costs: Försvarsberedningen (2019, p. 263). Consequences: Försvarsberedningen (2019, p. 267).
11. Cost: Augustsson (2019a).
12. Augustsson (2019a). Author's translation.
13. Champions: Bitzinger (2009, p. 182). List: Fleurant *et al.* (2019, p. 9); Industry percent: Swedish government (2019, p. 39). Sweden's second and third biggest arms companies, Bofors and Hägglunds, are both owned by British BAE Systems. Percent: Fleurant *et al.* (2019, p. 9); International sales: Saab (2019, p. 3).
14. Captive market: e.g., Bitzinger (2009, p. 189). Definition: One example of a captured market is buying food and water in an airport. Even if there would, in general, be no shortage of places to buy food and water—once inside the terminal the choices can be very limited (Business Dictionary, 2019). Buyer's market: see for example Bitzinger (2014, p. 208); Tan (2014, p. 24). Trade deals: Bitzinger (2009, p. 189).
15. Study: Försvarsberedningen (2019, p. 267). Figure 2 sources: Saab (2020); Ekonomistyrningsverket (2020). BAE share: United Kingdom government (2019). List: Augustsson (2019c).
16. Applications: FMV (2020b). Political force: Larsson (2019, p. 150). Revolving door: Svenska Freds (2010); Former Supreme commander Sverker Göransson started working for Saab's U.S. branch: TT (2016); former Minister of Defense Sten Tolgfors became partner of a PR firm with Saab as one of its clients: Röstlund and Lagercrantz (2013).
17. Augustsson (2019a).

18. Evertsson (2020).
19. Parliament: Augustsson (2019b). Rank and relations: TI (2010, p. 2); Feinstein *et al*. (2011). Demand: Svenska Freds *et al*. (2014). Percent: Author's calculations, based on TI (2015) and Swedish government (2010–2019). The index measures "the existence, effectiveness and enforcement of institutional and informal controls to manage the risk of corruption in defense and security institutions", TI (2015).
20. Petersson (2018).
21. Försvarsberedningen (2019, p. 266–269).
22. Åkerström (2018, p. 199). Author's translation.
23. 70 percent of Swedes are for example against Swedish arms exports to warring parties in the Yemen war, see Swedish Redcross (2019).

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