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Defense cooperation between Portugal & Spain within the current european framework

Abstract

The Member States of the European Union (EU) must assume the responsibility of their Defense and Security in an atmosphere defined by the existence of new threats, a lesser presence on the part of the United States, and the structural challenge that Brexit poses. The loss of military capabilities since the beginning of the crisis makes defense cooperation essential; this has materialized in a recent boost to the Common Security and Defense Policy (CSDP), which has recovered tools such as the Permanent Structured Cooperation (PESCO). Within this context, Portugal and Spain have put forward a new, constructive and convergent bilateral defense cooperation project that is a model of understanding. Through analysis of the possibilities, evolution, justification and importance of the model proposed, this article identifies the key points for the creation of mutually beneficial bilateral defense cooperation that would contribute to the strengthening of European defense.

Keywords

Pooling & Sharing; Smart Defense; Permanent Structured Cooperation; Portugal; Spain.

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Introduction

During the last decade, Portugal and Spain have been developing unprecedented cooperation on matters of Defense, framed since 2017 within the *Bayona Agreement*¹, which is the broadest and most ambitious legal framework in their history in this area. Thus, and considering the impetus which common defense currently holds in the European Union (EU), it is interesting to analyze the proposed model of cooperation, its possibilities, evolution, justification and importance. The purpose of this article is to introduce the key points for an understanding of how to build a model of mutually beneficial defense cooperation which will simultaneously contribute to the current build-up of European defense.

The development of effective security and defense cooperation has become an essential need for the States of the European continent in the XXI century. In recent years, the EU has been faced with a complicated scenario that has undermined its internal cohesion and its project, and it must react to maintain its position as a global and strategic actor within the multipolar order.

Among the main factors making up this situation are: the impact of the economic and financial crisis with the resulting reduction in defense budgets; the complexity of new threats such as the terrorist attacks in Paris, Brussels, London and Barcelona, to mention only a few; the precarious situation in the East after the annexation of Crimea by Russia; instability in the Mediterranean Sea after the ousting of Gaddafi in Libya, the civil war in Syria and the tragedy of refugees; the growing importance of emerging powers; the new direction of the Trump Administration in the US, which has repeatedly demanded a stronger commitment and contribution from NATO allies to the common defense (Benedicto, 2017, 53; Cózar, 2017, 3); and particularly, the decision of the United Kingdom to abandon the EU (Brexit), as it means the exit of its most powerful military force and of the major opponent to the creation of a European defense independent of NATO (García, 2016, 2).

Considering the circumstances, the necessary reaction lies in giving new thrust to the CSDP, an integral part of the Common Foreign and Security Policy (CFSP) that was reformulated by the Treaty of Lisbon². Although this treaty includes a set of

1 *Agreement between the Kingdom of Spain and the Republic of Portugal for Defense Cooperation* signed in Bayona (Pontevedra) on June 22, 2015, ratified by Portugal on October 12, 2016 and by Spain on June 29, 2017.

2 *The Treaty of Lisbon by which the Treaty of the European Union (TEU), and the Treaty establishing the European Union (2007/C 306/01)*, approved in Lisbon on December 13, 2007 and came into force on December 1, 2009. The *Treaty establishing the European Union* becomes the *Treaty on the Functioning of the European Union (TFEU)*.

tools³ for the creation of defense cooperation, among which the recently recovered Permanent Structured Cooperation (PESCO) stands out, the projects and initiatives⁴ proposed by the EU, the North Atlantic Treaty Organization (NATO) or by associations among Member States, have not obtained, to date, the expected results (Biehl, Giegerich & Jonas, 2013, 7). The European Defense Agency (EDA), responsible for managing communal technological development and construction of new capabilities, has suffered from insufficient funding and its results have so far been limited (Carlos, 2016, 11).

The difficulty in defense cooperation is due mainly to sovereignty issues, to the divergent vision that each State has of the threats to and interests of national security, to resistance towards a possible loss of independence derived from sharing capabilities, or to the protection of national armament industries (Duna and Dăncuță, 2014, 55). However, it is steadily becoming more commonly accepted that “*de jure* sovereignty, without the ability to act, is an empty concept. Being sovereign means providing security and not only being independent” (Drent, Homan and Zandee, 2013, 5). Thus, the main issue is how to bring into being the defense cooperation that seems essential, but which must overcome the afore-mentioned problems.

Starting from a regional perspective, a first option is the use of cooperation mechanisms included in the Treaty of Lisbon, mainly the PESCO; *Pooling & Sharing* (P&S) projects sponsored by the European Defense Agency (EDA); or Smart Defense (SD) and Framework Nation projects proposed within NATO. Another option, using a sub-regional perspective, consists in developing bilateral or mini-lateral⁵ clusters of cooperation (Naim, 2009, 10 June; Patrick, 2014, 1; Pertusot, 2015, 40), of which there are several examples in the European area, with different ends and objectives although not necessarily leading to strengthening common defense. An example is the recent European Intervention Initiative (EI2) headed by France, whose Letter of Intent was signed on June 25, 2018 by the Ministers of Defense from ten States (Belgium, Denmark, Estonia, France, Germany, the Netherlands, Portugal, Spain and the United Kingdom).

Spain and Portugal are a relevant case study within European defense cooperation. Both are members of the EU and of NATO, share a geographic, cultural and historical vicinity, and having overcome past disagreements, they are now a model of friendship, cooperation and understanding. The economic crisis has had a strong impact in both

3 Permanent Structured Cooperation (Art. 42.6, 46 and Protocol 10 of the TEU); Enhanced Cooperation (Art. 20 of the TEU and 326-334 of the TFEU); the Collective Defense Clause (Art. 42.7 of the TEU); the Solidarity Clause (Art. 222 TFEU); undertaking CSDP missions commissioned by the EU (Art. 42.5 and 44 TEU).

4 Initiatives at a regional level (by the multilateral organizations EU and NATO) and at a sub-regional level (bilateral and *mini-lateral* or clusters of States).

5 Mini-lateralism describes a type of multilateral cooperation where a small number of States or organizations form an association to reach an objective difficult to carry out on a multilateral scale.

countries, which share common threats and interests, a fact that has affected their security and defense capabilities at different levels.

Due to all of this, defense cooperation within the Peninsula has undergone unprecedented stimulus at all levels during recent decades, which started in 2008 with the first meeting of the Hispano-Luso Security and Defense Council (HLSDC)⁶ (EFE, 2013, 10 May) and ended when the *Bayona Agreement*⁷ came into force on 29 June, 2017. This new legal framework at the highest level includes areas such as defense policy, military cooperation, planning of capabilities, the use of forces or weaponry and defense industries. Upon implementing the Agreement, both countries are coordinating their international stance regarding security and defense issues⁸; they are jointly fighting against international terrorism from the Besmaya Base (Iraq); they support each other in EU Training Missions (EUTM), EUTM Mali and EUTM RCA; they jointly contribute in the creation of the European Battlegroups (EUBG) and of NATO's Very High Readiness Joint Task Force (VJTF)⁹ and NATO Response Force (NRF); they coordinate logistical support to its contingents abroad and exchange operational information about areas of common interest, such as the Gulf of Guinea.

This article falls within the area of the study of EU strategy, security and defense. It aims to analyze the defense cooperation being carried out by Spain and Portugal, considering its recent evolution and updating, in order to establish its convergence with the initiatives undertaken in Europe in that area and its contribution to the common defense. Taking into consideration the current factors of change, the intention is to identify the key aspects that may contribute to making the bilateral project a real strategy¹⁰ of cooperation (Lykke, 1989, 3), mutually beneficial and relevant to reinforcing European cooperation in this area. To this end, examination is made of the most recent official communiqués and documents adopted by the institutions and States involved, as well as other relevant academic and doctrinal sources.

Firstly, the current situation of common defense in the EU is dealt with, describing its recent evolution and present impetus. Next, cooperation at the sub-regional level is reviewed, outlining its opportunities and limitations, and proposing the conditions

6 The creation of the HLSDC was announced at the Hispano-Luso Summit in Badajoz in 2006.

7 *Agreement between the Kingdom of Spain and the Republic of Portugal for Cooperation in Defense Matters*, signed in Bayona (Pontevedra) on 22 June, 2015, ratified by Portugal on 12 October, 2016, and by Spain on 29 June 2017.

8 Exemplified in the *Position Paper from Portugal and Spain* presented at the Security and Defense European Council in June, 2015. In this document, Spain committed itself to head the EUBG every three year with the support of Portugal.

9 Within the EU, Portugal has confirmed its contribution to the EUBG 2019/1, headed by Spain. Within NATO, the integration of Portuguese forces with Spanish ones is expected in VJTF18 and eNRF18.

10 A strategy is composed of ends, methods and means. The ends are the objectives to be reached; the methods are the ways of organizing and applying the resources, and the means, the areas and activities of cooperation.

necessary for success. Following this, the situation of the bilateral defense cooperation between Spain and Portugal is reviewed, justifying its expedience through analysis of the strengths, weaknesses, opportunities and threats in each of the two countries. Lastly, the model of peninsular cooperation is evaluated, observing how the aforementioned necessary conditions for success are satisfied, and pertinent recommendations are made. The study ends with a summary of the main conclusions reached.

Problems facing European defense

The lack of political will and commitment in the EU has caused the blocking of the CSDP for years. In a context defined by the reduction of the presence of the US on the continent¹¹ (Kempin and Scheler, 2015, 46), there are serious shortages for the creation of forces, financing for operations, the formulation of common interests and the definition of strategies that will allow defending them (Alonso 2015, 154).

Although the gaps in capabilities have been identified by the EM in the EU on several occasions, little has been done to fill them (Nissen, 2015, 12). The CSDP has focused more on the prevention and management of crises than on the development of common capabilities and functions related to military issues, including territorial defense and deterrence, which are considered mainly within the framework of NATO (Alfonso, 2015, 172-173). In spite of that, since the first “European Strategy for Security”¹² was presented, major progress has been made, over 30 operations and missions having been developed and which are now present on three continents (European External Action Service – EEAS, 2016).

The coming into force of the Treaty of Lisbon in 2009 helped to consolidate the structures of rapid reaction in situations of crisis and conflict, and to define tools such as the collective defense clause and the PESCO, which have taken a long time to utilize. The first one was activated for the first time in November, 2015, at the request of France after the attacks in Paris (Europapress, 2015). The second was finally established by the European Council on December 11, 2017 (EEAS, 2018), in its “inclusive and ambitious” mode, with the participation of 25 Member States (MS), among which are Spain and Portugal.

Given the difficulty in establishing a PESCO¹³, and in order to mitigate cutbacks in defense, Germany and Sweden suggested the so-called Gante Initiative in 2010, less extensive (Alfonso, 2015) and consistent in the P&S¹⁴ of some capabilities among MS

11 From 213,000 troops in 1990 to 64,000 in 2015.

12 *A safe Europe in a better world – European Security Strategy*. Brussels, 12 December, 2003.

13 The financing, direction and management of the PESCO must still be solved.

14 *Pooling* is the combination of efforts by several MS to develop a capacity from which they will benefit jointly. *Sharing* is the use by several MS of a capacity developed by one MS, or the execution of tasks by one country to benefit another one.

(Parent, 2015, 4). This initiative had a very limited result, as did the development of capabilities under the control of the EDA. For its part, NATO proposed the equivalent SD (Pertusot, 2015, 27), oriented towards priority capabilities for the Alliance, but which ended up being limited to capabilities of little relevance: logistical, training and non-cinetic. In both cases, cooperation was limited to matters that were not critical to the MS (Pertusot, 2015, 20), mainly in the field of training, which neither compromised sovereignty, nor implied specialization.

Secretary of State Robert Gates' speech in June of 2011 (Traynor, 2011, 10 June) and the announcement that the US would only provide 50 percent of the capabilities of the Alliance marked the beginning of a new era for defense in Europe in terms of responsibilities (Möling, 2015, 5). The crises in Libya, Syria, Iraq and Ukraine were clear indicators of the level of dependence of the EU with respect to the US, as well as of the growing loss of capabilities of its defense industry (Shanker and Erlanger, June, 2011, 10 June). It was impossible to ignore this imperative any longer, taking into account that the EU had lost 20 percent of its defense capabilities since 2008 (EDA, 2018), and was paying very large amounts for redundancies and uncoordinated national acquisition processes. The continual reduction in defense expenditures had had as a consequence a European structural disarmament, with a numerical reduction of 500,000 soldiers in the EU during the period 2006-2012 (Pertusot, 2015, 25). On the other hand, the cutbacks were aggravated by the demands of the *Treaty on Stability, Coordination and Governance of the Economic and Monetary Union* (TECG)¹⁵ which called for a reduction in public debt to below 60 percent and a deficit lower than 3 percent.

The *European Union Institute for Security Studies* (EUISS) published a report in 2013 (Rogers and Gili, 2013, 9-15) in which it identified several problems that European defense faced: reduction in defense budgets in most of the MS; inefficient investment; inadequate military capabilities; and equipment with insufficiently advanced technology. Furthermore, there was a conflict of opinion between the planning of the forces and the management of the operations; cooperation in defense, industry and technology was limited and a strategic culture that specified when, where and how the EU should use force was lacking, thus defining the real capabilities to be developed (Nissen, 2015, 11). The question of national interests and divergent strategic cultures, fear of the specialization that the P&S and SD imply, and, in short, sovereignty and trust emerged as key limiting elements.

A new impetus to European cooperation in defense

The European Council reopened the debate about common defense in December of 2013¹⁶, with the aim of examining defense cooperation in order to support a credible

15 *Treaty on Stability, Coordination and Governance*, signed in Brussels on 2 March, 2012.

16 Conclusions of the European Council 19/20 December, 2013, held in Brussels on 20 December 2013. EUCO 217/13.

and efficient CSDP, fully complementary with NATO. It was decided to undertake actions on three central areas: those of increasing the efficiency, visibility and impact of the CSDP; of boosting the development of defense capabilities, and of strengthening the European defense industry.

The main focus was on improving the rapid response capabilities of the EU, including the EUBG; improving the financing of missions; developing the regulatory framework of European cyber-defense and the European Union Maritime Security Strategy¹⁷; developing an integrated and competitive European Defense Technological and Industrial Base (EDTIB); and stimulating greater cooperation in the development of capabilities in order to solve essential deficiencies (unmanned air systems, air-air refueling capability, satellites, and cyber-defense communications were given priority under the direction of the EDA).

Within the framework of NATO, the Wales Summit in September, 2014 implied a commitment of all European allies to minimizing the Defense budget reductions (Major and Mölling, 2014, 1). It was decided to reach a defense expenditure of 2 percent of the GDP in 10 years, allocating 20 percent to large projects and Investigation and Development (I+D). In this context, Germany proposed the concept of Nation-framework (Rahbek-Clemmensen and Rynning, 2015, 96), which consists in the creation of clusters of States organized around a nation that provides the main military structure¹⁸ to which the other nations contribute with their capabilities in a complementary manner.

The European Council on 26 June, 2015 simply reiterated the conclusions of the Council in 2013, highlighting the need for a more efficient, visible and result-oriented CSDP, greater development of civilian and military capabilities, and the strengthening of the European defense industry (Cîrlig, 2015, 4). Regional initiatives, sponsored by the multilateral organizations, NATO and the EU, were still perceived as too limited or as a synonym of loss of sovereignty and control over cooperation. Thus, both structures were constituted solely as support platforms and to facilitate cooperation mainly developed at a sub-regional level.

Only a year later, two decisions made at the polls turned into major factors for a change in European defense: on the one hand the victory of Brexit in the United Kingdom (23 June 2016) and on the other, the new Administration in the US (8 November). President Trump had announced during his campaign that solidarity within NATO should be conditioned by the contributions of the allies (Sanger and Haberman, 2016, 20 July), demanding that the level of expenditure agreed upon be reached, and that there be a reduction of European dependency on the US. (Massart, 2017, 1)

17 *European Union Maritime Security Strategy*, adopted in Brussels by the Council for General Affairs on 24 June, 2014.

18 An example of this initiative is the current German-Dutch defense cooperation or Griffin Project, as set forth in the Declaration of Intentions between the German and Dutch governments in order to give impetus to their bilateral relations in the area of defense; signed in May, 2013.

The response given by the EU to this situation is defined by the Global Strategy for Foreign Policy and Security of the European Union¹⁹ and by a new agenda for European Defense, defined in the second semester of 2016. The first step was to re-launch the strategic association EU-NATO through a Joint Declaration²⁰ issued at the NATO Summit in Warsaw in July. In September, the EU Summit in Bratislava opened the way to defining a Road Map²¹ for strengthening the Union of the 27 after Brexit, and shortly before year's end, the Global Strategy Implementation Plan and its complementary European Defense Action Plan (EDAP)²² were approved. These two plans are the concrete results of the new course adopted in order to strengthen European defense, reactivating the PESCO and including the development of capabilities and of the defense industry.

During the Rome Summit on 25 March 2017, Jean-Claude Juncker presented the *White Paper on the Future of Europe*²³, describing the difficulties that the EU presently faces. The hypotheses with regard to the future were described through five scenarios, starting from the reduction to a single market to an ambitious “doing more all together”. One possible action for breaking the deadlock in the situation was that of “coalitions of interested parties”, collaborating in specific areas of intervention, such as security and defense.

The year 2017 was marked by two essential milestones for European security and defense. The first was the *Communication from the Commission on a European Defense Fund*²⁴, designed to coordinate, complement and increase national investments on research for defense, development of prototypes and the acquisition of technology and equipment. The principal argument was global savings estimated at between 25 and 100 billion euros, considering that 80 percent of acquisitions and over 90 percent of research is carried out at a national level. The Commission estimated savings on national expenditure on defense of up to 30 percent annually.

19 *A common vision, a joint performance: A stronger Europe*, presented by the High Commissioner to the European Council in Brussels on 28 June 2016.

20 *Joint Declaration by the President of the European Council, the President of the European Commission, and the Secretary General of the North Atlantic Treaty Organization*, presented in Warsaw on 8 July, 2016.

21 *Bratislava Declaration and Road Map*, presented at the European Council in Bratislava on 16 September, 2016.

22 *Global Strategy Implementation Plan*, presented by the High Commissioner in Brussels on 14 November, 2016. *European Defense Action Plan*, proposed by the Commission in Brussels on 30 November, 2016.

23 *White Paper on the Future of Europe (Reflections and scenarios for the Europe of the Twenty-seven in 2025)*, COM (2017) 2025 of 1 March 2017.

24 *Communication from the Commission on a European Defense Fund*, in Brussels on 7 June 2017. IP/17/1508.

In its meeting on 22 and 23 June 2017²⁵, the European Council asked the MS to make an effort to establish the Fund, and it urged them to reach an agreement regarding the proposal of a *European Program for Industrial Development in Defense*²⁶. Furthermore, the Council highlighted the need to set up an “integrating and ambitious” PESCO before the end of the year. The Council met again on 19 October, stressing the need for the PESCO, the Fund and the Coordinated Annual Revision for Defense (CARD)²⁷ to mutually strengthen one another (European Defense Agency, 2018a).

The second milestone was finally reached at the European Council on 14 December²⁸, with the establishment of a PESCO by 25 MS (except for the United Kingdom, Malta and Denmark). Furthermore, it was requested that work on the Fund should continue, and that the Program be adopted in 2018 so as to be able to finance the first projects in 2019. Finally, definition was also requested of a specific instrument encompassing all needs for development of capabilities, beginning in 2020.

Defense cooperation at a sub-regional level: the alternative way

When the time came to select from specific P&S or SD projects oriented towards closing gaps in capabilities, and while the implementation of a PESCO still in its initial phase was delayed, some MS decided to choose an alternative way and establish clusters or bilateral frameworks of defense cooperation (Mölling, 2015, 14). Defense cooperation among MS was not something new, although its objectives were. This mini-lateral way is a response to the need to preserve or create capabilities, given the stagnation of the multi-lateral way, mainly due to the difficulty in reaching a consensus on the divergent interests of the participants.

These are initiatives of variable geometry involving between two and five States, normally neighbors of a similar size and with a common vision of defense; institutionalized at different levels; more or less flexible, and oriented towards operational problems and those of capabilities. (Pannier, 2015, 74). A common aspect of these initiatives is the concurrence of interests (threats, objectives and needs), the existence of a high degree of mutual trust and of a previous history of cooperation (Table I)

25 *Declaration by the European Council*, in Brussels on 23 June 2017.

26 *Proposal for A European Program with the aim of giving support to competitiveness and the capability of innovation of the defense industry in the Union*, presented by the Commission in Brussels on 7 June 2017. COM (2017) 294 final.

27 The *Coordinated Annual Revision for Defense (CARD)*, managed by the EDA, aims to identify the shortage in national defense and to facilitate coherence in expenditure, on the basis of transparency, political visibility and the commitment of the Member States. Its full implementation is expected for the autumn of 2019.

28 *Declaration by the European Council*, in Brussels on 14 December 2017

INICIATIVE	FORMAT and CREATION	OBJETIVES
The Élysée Treaty (GER, FRA)	Bilateral Agreement (1963), strengthened in 1988	<ul style="list-style-type: none"> · Political-military approach · Inter-operability, training of forces · Mixed military units
The Weimar Triangle (GER, FRA, POL)	Ministerial Declaration (1991)	<ul style="list-style-type: none"> · Political-military approach
The Visegrad Group (CZE, HUN, POL, SLO)	Meeting of Defense Ministers (1999)	<ul style="list-style-type: none"> · Political-military approach · Inter-operability, training of forces · Industrial and Capability Projects
NORDEFECO (DNK, FIN, ICE, NOR, SWE)	Protocole (2009)	<ul style="list-style-type: none"> · Inte-roperability, training of forces · Industrial and Capability Projects
Lancaster House Treaties (FRA, RU)	Bilateral Agreement (2010)	<ul style="list-style-type: none"> · Industrial and Capability Projects. · Inter-operability, training of forces · Nuclear (testing infrastructures)
Project Griffin (GER, NDL)	Declaration of Intentions (2013) Concept of Nation-framework	<ul style="list-style-type: none"> · Industrial and Capability Projects In-teroperability, training of forces · Mixed military units

Table I— Principal sub-regional cooperation initiatives in Europe
Source: Elaborated by the author using Pertusot, 2015, 29.

Their main advantages are flexibility, acceptability of the projects and the fact that they can reach results very rapidly (Drent, Zandee, and Csteleijn, 2014, 16). In spite of this, the danger of fragmentation that this means at a European level still persists if the result of the improvement of national capabilities is not coordinated in a “cluster of clusters” (Kempin and Scheler, 2015, 48). Undoubtedly, these initiatives can reduce costs and, if they are adequately coordinated, they can contribute to increasing the performance of European defense, building capabilities of regional range; bringing about harmonization and interoperability of military equipment; creating common maintenance and shared training and education as well as common infrastructures; and even creating mixed operational units (Drent et al., 2013, 10).

The sub-regional projects are viewed in contradictory fashion, seen either as being for the improvement of cooperation, or as a limitation to more global initiatives at the European level (Cîrlig, 2015, 6). These options of variable geometry can contribute to the construction of European defense if they are part of the CSDP framework and they promote the general interest of the EU. In any case, the initiatives mentioned have mostly had the aim of preserving national interests, based on specific projects and priorities that have not been able to attract the interest of other MS (Ballesteros et al., 2013, 27).

Three models of cooperation can be distinguished on an ascending scale in terms of sovereignty demands (Drent et al., 2013, 12): (a) Modular, whereby the participants complement and strengthen each other, but the modules are still independent and detachable without cooperation from others (i.e.: the Belgian and Dutch naval cooperation – BENESAM, or the French-British Combined Joint Expeditionary Force – CJEF); (b) Integration, whereby the projection of a capability is possible only when all the participants contribute (i.e.: 1st DEU-NDL Force HQ); and (c) Specialization:

the participants split functions and tasks, and are mutually dependent (i.e.: protection of the air space in the Baltic States and Iceland).

Few publications attempt to identify the determining criteria for the success or failure of a cooperation model. It seems obvious that there is not one single formula because cooperation in the area of defense is the result of many interrelated factors, whether they are of a structural nature (strategic cultures or historical experience), or of a temporary nature (cutbacks in budgets or personal relations among political leaders).

One of the first works that analyzed the lessons learned from cooperation in defense was *Surviving Austerity* (Valasek, 2011). Valasek stressed the importance of clusters or “islands of cooperation” as a way to maintain and develop military capabilities in Europe. This concept was later renamed *mini-lateral* cooperation by the *Institute Français des Relations Internationales (IFRI)* (French Institute of International Relations).

In subsequent years, the many works by the Netherlands Institute of International Relations (Dickow, Drent, Landman, Overhaus & Zandee, 2013; Drent, Zandee & Casteleijn, 2014; Drent, Zandee & Maas, 2015), among which the report *Defence Cooperation Models: Lessons learned and usability* (Drent, Hendriks y Zandee, 2016, 3-7) stands out, managed to identify a set of twelve conditions necessary for success: (a) trust and solidarity; (b) sovereignty (understood as the “capability for action”); (c) similar strategic cultures; (d) geographic and cultural proximity; (e) number of members (initially limited); (f) countries and forces of similar size and qualities (mutual trust and understanding compensating asymmetry, as shown by the German-Dutch, Franco-Belgian and German-Danish success); (g) downward and upward process (strong political and military leadership, along with the commitment of the participating personnel); (h) adaptations in defense culture, organization and concepts (multinational thought); (i) alignment in defense planning (similar equipment); (j) standardization and interoperability; (k) realism, clarity and serious intentions; and (l) participation of the Parliaments.

This set of conditions can be used as a measuring tool, making a comparison among the different initiatives and the results obtained from these. Thus, in the example of the successful German-Dutch cooperation (Project Griffin), the compliance with most of the conditions put forward can be seen. In other cases, such as the Visegrad Group, the way in which geographic and cultural proximity facilitate cooperation is illustrated, in spite of its much more modest results.

Current situation of defense cooperation between Portugal and Spain

Although Portugal and Spain are neighboring countries, for many centuries they did not develop a level of relations in accordance with that situation, nor with the mutual benefits they could thereby obtain. There has been a historic rivalry leading to incompatible projects and international alliances oriented towards the redistri-

bution of the balance of power (Maio, 2013, 15), instead of helping synergy and joint action.

Peninsular bilateral relations have evolved greatly in recent years, as a careful reading of the bilateral Treaties and Agreements bears witness to. Nevertheless, a common history which was not always cordial is evident. Thus, it is interesting to note that in 1939, “Friendship and non-aggression”²⁹ was talked about, and in the pre-democratic period in 1977, the terms used were “Friendship and cooperation”³⁰. In any case, the result of bilateral diplomatic relations in the last thirty years is very positive, and after centuries of complex relations, with periods of approximation and of hostility, a convergence between the two countries and their societies has finally been established.

The progressive alignment of positions and strategies between Spain and Portugal is due to several factors (Chislett, 2004, 2-5): the natural convergence of interests by virtue of their vicinity; the synchronic development of the processes of transition and democratic consolidation; Spain’s admission into NATO (1982); their simultaneous assimilation into the European Communities (1986), and the subsequent development via the different European Treaties. All of this has contributed to revitalizing and multiplying the forms of bilateral relationship, opening new areas of cooperation.

Considering the geographic factor of indivisible vicinity, peninsular economic integration was swift, and solid relations of interdependence were established (Ministry of Foreign Affairs and Cooperation [MAEC], 2016, 5). The two countries have built up a complex framework of bilateral treaties and agreements that ensure the normal functioning of bilateral and cross-border relations. Noteworthy are the aforementioned “Treaty of Friendship and Cooperation” of 1977, which will be revised in the near future (the Government’s Presidency, 2015, 2; Sánchez, 2015, 3); the “Treaty of Valencia” in 2002 on cross-border cooperation between territorial entities and authorities; and the “Albufeira Agreement” in 2008 on cooperation in matters of Portuguese-Spanish hydrographic basins, which are added to a long historical heritage in which the “Treaty of Limits” of 1864 stands out, valid for a century and a half.

Political contacts are numerous and intense, the Spanish-Portuguese Summits initiated in 1983 being the main mechanism of consultation at the highest level and the motor of bilateral relations. At the end of the 27th Summit in Vidago (2014), the then Portuguese Prime Minister Pedro Passos Coelho declared, referring to bilateral relations on the Peninsula, that “we are now living in times of difficult choices, of limited resources, that invite us to promote each other’s capabilities of defending our shared interests” (Vieira, 2014, 1). The subsequent summits, held in Bayona (28 June 2015)

29 *Treaty of Friendship and non-aggression*, signed in Lisbon on 17 March 1939, as well as the respective additional Protocols of 29 July 1940, 20 September 1948 and 22 May 1970.

30 *Treaty of Friendship and Cooperation between Portugal and Spain*, signed on 22 November 1977.

and in Vila Real (29 May 2017), took place within a context of broad bilateral understanding and commitment to the European project (Observador.pt, 2017, 1).

Since joining the European Communities, peninsular cooperation in the area of foreign policy has been very close, realized through frequent contacts to maintain frequently coinciding positions vis-à-vis the EU. The two countries promote common projects on a regional basis, such as the Iber-American Summits (Ferreira Gomes, 2017, 10-12) and the Defense 5+5 Initiative, this latter having turned into a major forum in the Mediterranean area. At the global level, among others, especially noteworthy is their mutual support at the United Nations Security Council (UNSC) for the candidacies of Portugal (2010-2011) and of Spain (2015-2016).

In any case, there are also limitations which it is important to stress. Moreira de Sá (2015, 70) states in his study on current Portuguese foreign policy that there is a permanent and obvious concern in this area considering the possible loss of individuality, in every exclusive initiative of the “Latin union” or “Iberian bloc” type with Spain. For his part, Aznar Fernández-Montesinos (2015, 4) stresses that it is precisely multilateral cooperation, acting to dilute individual differences, that could be useful as for responding to all possible lack of balance in the exclusive relations between the parties. According to this reasoning, multilateralism could reduce the loss of sovereignty implicit in any agreed relation, providing it with a more equal nature. Within the European context, this favors making possible bilateral or mini-lateral relations among countries with asymmetric potential, which simultaneously reinforces the multilateral framework.

The Government of Spain has made considerable progress during recent legislative terms of office in the area of Security and Defense, which is reflected in documents such as the *Directiva de Defensa Nacional (DDN)*³¹ (National Defense Directive) of 2012; the *Estrategia de Seguridad Nacional (ESN)*³² (National Security Strategy) of 2017; the *Ley de Acción y Servicio Exterior del Estado* (Law of Foreign Action and Service of the State) of 2014; the *Estrategia de Acción Exterior* (Foreign Action Strategy) of 2014, and the *Ley de Seguridad Nacional* (National Security Law) of 2015. All of this defines a new direction, whereby the bilateral sphere and, most particularly, relations with Portugal occupy a place of priority.

For its part, Portugal defined a new *Conceito Estratégico da Defesa Nacional (CEDN)* (National Defense Strategic Concept) in 2013; the *Modelo de Defesa Nacional DEFESA 2020* (National Defense Model) in 2013; the *Lei de Defesa Nacional* (National Defense Law) in 2014, and the document *A Defesa de Portugal* (Portugal's Defense) in 2015, whereby strategies are identified and lines of action are designed,

31 *National Defense Directive 1/2012 «For a necessary defense, for a responsible defense»*, passed in Madrid in July 2012.

32 The *ESN 2017* was passed by Royal Decree 1008/2017 of 1 December, improving the *ESN 2013*, first Spanish security strategy, derived from the revision of the never-implemented *Estrategia Española de Seguridad* (Spanish Security Strategy) of 2011.

with a manifest intent to increase bilateral and multilateral cooperation in specific areas of interest.

This recent drive on the part of both countries makes use of fundamental tools such as diplomacy, the Armed Forces, the State's Security Corps and Forces, Intelligence Services, civil protection, cooperation to on development, and economic and trade relations. This opens the way to greater collaboration in the sphere of defense in geographic areas of common interest such as Africa, where Portugal has great experience and keeps active a program of *Cooperación Técnico-Militar (CTM)*³³ (Techno-military Cooperation). The sub-regions of the Sahel, the Gulf of Guinea and the Horn of Africa, identified by both countries as areas of vital interest³⁴, are already now represent the main scenario for such cooperation.

Legal Framework for Bilateral Defense Cooperation: The Bayona Agreement

Bilateral relations with respect to defense are presently defined by the *Agreement between the Kingdom of Spain and the Republic of Portugal on Cooperation in the Area of Defense* signed in Bayona in 2015, at a level of International Treaty and in force since 2017. This agreement replaced the former Protocol of Cooperation between the Ministry of Defense of the Republic of Portugal and the Ministry of Defense of the Kingdom of Spain dating from 1998 (Table II).

As an intermediate step, the two Ministries of Defense signed a *Joint Declaration of Intentions to Strengthen Cooperation in the Area of Defense* in 2012, considering that it was necessary to provide the appropriate judicial framework to a level of relationship that already existed *de facto*. The *Declaration* stated the intention to develop a strengthened bilateral cooperation that would contribute to improving regional security and defense within NATO and the EU. Several initiatives in different areas were decided upon: (a) in the area of defense policy, it was decided to review the Protocol of 1998; (b) in the area of General Staffs, to continue holding the meetings of the Peninsular General Staff periodically, effective since 1952, and to boost bilateral cooperation activities; (c) in the area of military cooperation, planning of capabilities and the use of forces, to explore the joint development of capabilities within the framework of P&S and SD; and (d) in the area of cooperation regarding armament and defense industries, to intensify cooperation in the priority areas of aeronautics, naval affairs, communications, information technologies, and demilitarization.

33 The Portuguese Armed Forces keep active *CTM* (Techno-military cooperation) with several countries in on the continent, with the presence of advisors and instructors in Mozambique, Angola, Guinea-Bissau, São Tomé e Príncipe and Cabo Verde.

34 GOVERNMENT OF SPAIN. (2014). *Foreign Action Strategy* (Ministry of Foreign Affairs and Cooperation, Ed.). Madrid: Government of Spain. GOVERNMENT OF PORTUGAL. (2013). *Strategic Council for National Defense*. Lisbon. Government of Portugal.

Protocol of Cooperation between the Ministry of National Defense of the Republic of Portugal and the Ministry of Defense of the Kingdom of Spain (1998)	Agreement between the Kingdom of Spain and the Republic of Portugal on Cooperation in the Area of Defense (2015)
<p>- Based on the Treaty of Friendship and Cooperation (1977)</p> <p>- Areas of Cooperation:</p> <ol style="list-style-type: none"> 7. Exchange of international defense policy, organization and management of Armed Forces personnel, military education and training, exchange of courses, hospital and health assistance, and legal systems. 8. Scientific and technological research. 9. Strengthening the bonds of industrial cooperation 10. Promoting mutual knowledge of cultural values. 11. Mixed exercises. 12. Exchange of points of view: military defense planning, professionalization and modernization; peace-keeping and humanitarian operations. 	<p>- Updates the Protocol (1998)</p> <p>- Includes the Declaration of Intentions (2012)</p> <p>- Areas of Cooperation:</p> <ol style="list-style-type: none"> 23. Cooperative Defense/Security Policy. 24. Management, training, and exchange of civilian and military personnel. 25. Joint actions in technology/industry, research and development, defense material and equipment. 26. Defense industry: EDA projects. 27. Naval Construction, maintenance and technology. 28. Promotion of historical, cultural and sports activities. 29. Carrying out of military exercises. 30. Planning of capabilities and use of forces. 31. Common actions in humanitarian or peace-keeping operations. 32. Joint and mixed operations. 33. Agreement of national stances before regional and international organizations. 34. Sharing of P&S and SD capabilities. 35. CSDP: EUBG. 36. Maritime security. 37. Military telecommunications. 38. Joint actions in cases of emergencies and catastrophes. 39. Air defense, overflights and landings, and search and rescue operations. 40. Management of air space. 41. Operational/transit air traffic. 42. <i>Cyberdefense</i> and global terrorism. 43. Energy and climate. 44. Geographic, cartographic, hydrographic, oceanographic and meteorological activities.

Table II – Evolution of the Bilateral Agreements (1998-2015)

Source: Elaborated by the author.

All of these initiatives as well as new ones have been included in the *Bayona Agreement*. This new judicial framework consolidates the *CLESD*, presided over by the Heads of Government, as the fundamental structure for the direction and management of cooperation on security and defense.

Reasons for peninsular cooperation on defense matters

In 2012, the then Minister of Defense Aguiar Branco declared that Portugal and Spain could jointly build up military capabilities, justifying this in saying that “we cannot hope that we alone will have the strength to be actors for security, not only secondary but rather irrelevant, such as is demanded in terms of national defense” (Silva Machado, 2012, 18 September).

PORTUGAL	SPAIN
<i>Conceito Estratégico da Defesa Nacional</i> (2013) <i>Modelo de Defesa Nacional DEFESA 2020</i> (2013) <i>Lei de Defesa Nacional</i> (2015) <i>A Defesa de Portugal</i> (2012)	<i>Directiva de Defesa Nacional</i> (2012) <i>Estrategia de Seguridad Nacional</i> (2017) <i>Ley de Seguridad Nacional</i> (2015) <i>Estrategia de Acción Exterior</i> (2014) <i>Ley de Acción y Servicio Exterior del Estado</i> (2015)

Table III– Key documents for security, defense and foreign action

Source: Elaborated by the author.

Nevertheless, justification for the need of peninsular cooperation in defense matters is not due only to the economic crisis. Thus, for example, the *Directiva de Defensa Nacional* (National Defense Directive) of 2012 explicitly states that Spain will actively and responsibly participate in NATO initiatives that favor national and collective interests; in the configuration and advance of the CSDP and the PESCO; and that it will strengthen bilateral relations with those actors holding shared threats and interests, who could provide stability in their context of proximity or improve the strategic position of the country.

It seems relevant for this study to carry out a comparative analysis of the essential documents on security and defense matters of Portugal and of Spain (Table III), contrasting their interests, threats, strengths, weaknesses, and international contexts of action in order to understand the causes that justify the implementation of bilateral cooperation and the mutual benefit to be obtained.

The approach taken by each of the two countries holds certain differences. Portugal uses a key document, the *Conceito Estratégico de la Defensa Nacional* (National Defense Strategic Concept), to set forth all aspects regarding the State's defense and foreign action. For its part, Spain uses two documents, the *Estrategia de Seguridad Nacional* (National Security Strategy) and the *Estrategia de Acción Exterior* (Foreign Action Strategy), which take the form of interministerial systems defined by specific laws.

	PORTUGAL	SPAIN
INTERESTS	6. Assert its presence in the world. 7. Consolidate its integration in a solid network of alliances. 8. Defend the legitimacy and foreign credibility of the State 9. Value the Portuguese communities. 10. Contribute to promoting international peace and security.	8. State Defense: territory, access, population, constitutional order, sovereignty and independence. 9. Factors deriving from Spain's geographic situation and maritime condition. 10. Use of maritime and air communication routes. 11. Supply of basic resources. 12. Peace and stability in the Mediterranean. 13. Cooperation with Latin America 14. Promotion of international peace and security.
THREATS	10. Terrorism. 11. Proliferation of weapons of mass destruction (WMD). 12. Transnational organized crime. 13. Cybercrime. 14. Piracy. 15. Climate changes, environmental and seismic risks. 16. Occurrence of heat and cold waves. 17. Attacks on land and marine ecosystems. 18. Pandemic and other health risks.	13. Terrorism. 14. Proliferation of WMD. 15. Transnational organized crime 16. Cybercrime 17. Armed conflicts. 18. Vulnerability of maritime space. 19. Vulnerability of critical infrastructures and essential services. 20. Economic and financial instability. 21. Energy vulnerability. 22. Irregular migration flows. 23. Espionage. 24. Emergencies and catastrophies.

Table IV – Comparison of interests and threats.

Source: Elaborated by the author based on Foreign Action Strategy (2014) and National Defense Strategic Concept (2013).

Table IV shows a comparison of the clearly similar interests declared by each country and the main threats considered. Many of the interests include potential areas of cooperation, both countries being members of the EU and NATO, and participants in initiatives in the Mediterranean and part of the Latin American community.

The *DDN* (National Defense Directive) stresses that defense of the MS of the EU is only feasible and sustainable through cooperation. In any case, the main limitation imposed by Spain on cooperation corresponds to the so-called “non-shared threats”. These include Ceuta, Melilla and the sovereign territories in the North of Africa, defense of which cannot be based on international cooperation.

	PORTUGAL	SPAIN
STRONG POINTS	7. Centered on the Atlantic area; 8. Consolidated democratic regime; 9. Participation in the EU, NATO and CPLC; 10. History, identity and cohesion; 11. Cultural and linguistic area; 12. Communities of emigrants	6. Strategic position: Africa, America; 7. Advanced democracy; 8. Open and diversified economy; 9. Infrastructures; 10. Spanish language and diversity;
WEAK POINTS	7. Aging of the population 8. Energy, food dependency 9. Economic-financial imbalance 10. Low economic competitiveness; 11. Inadequacies in the judicial system 12. Problems with land management	4. Demographic weakness: Aged country; low fertility rate; high immigration. 5. Natural resources: scarce water ; energy (70.8% foreign) 6. Foreign presence: companies vulnerable to political decisions; low I+D; few export companies.

Table V – Comparison of strong and weak points.

Source: Elaborated by the author based on Foreign Action Strategy (2014) and National Defense Strategic Concept (2013).

In the cultural area, Portugal and Spain lead two of the largest language communities in the world. According to Durántez Prados (2015, 5-6) there are great possibilities for *Iberophonia* in the globalized world, defined as the multinational area made up of people with Iberian languages, which extends throughout all continents, including thirty countries and over 700 million people. The uniting of this space, strictly respecting the prominence of each country within its area, could constitute an opportunity to increase influence in a world mostly Anglophone.

A high convergence stands out among the different factors analyzed (Table V), which has given rise to common projects for cross-border development and cooperation, such as the distribution of water resources, energy projects and initiatives on infrastructures. The key word in this case is trust, strengthened within the multilateral framework of the EU.

	PORTUGAL	SPAIN
REGIONAL SECURITY CONTEXTS	g) Europe and the EU. h) USA, transatlantic relations. i) North of Africa and the Middle East. j) Sub-Saharan Africa k) Atlantic. l) Asia. Strategic Areas of Interest: <ul style="list-style-type: none"> · Euro-Atlantic area. · Peninsula and the Mediterranean. · South-Atlantic. · India-Asia. 	h) EU i) Mediterranean and Middle East. j) Latin America and the Caribbean. k) Transatlantic Relationship: USA, Canada l) Sub-Saharan Africa m) Asia-Pacific. Australia. n) Rusia. Vital areas: <ul style="list-style-type: none"> · The Sahel. · Horn of Africa. · Gulf of Guinea.
COOPERATIVE SECURITY	EU 4. NATO 5. UN 6. OSCE	EU NATO UN OSCE

Table VI – Comparison of international contexts

Fuente: Elaborated by the author based on Foreign Action Strategy (2014) and National Defense Strategic Concept (2013)

International contexts (Table VI) and foreign action respectively for each country, together with the same cooperative security structures, are another added value justifying the need for security and defense cooperation. The ESN (National Security Strategy) identifies several strategic contexts in the globalized world and three Vital Areas. For its part, Portugal delimits Strategic Areas of Interest. One form that this common interest takes is the *Position Paper*³⁵ for multilateral cooperation in the Gulf of Guinea, presented jointly by Denmark, France, Portugal and Spain at the EU in 2015.

The Portuguese-Spanish Council for Security and Defense (CLESD)

The bilateral Summit in Badajoz in 2006 was of major importance in the area of security and defense, due to the decision to create the *CLESD*, under the authority and lead of the Heads of Government. The *CLESD* represented a significant qualitative leap in the establishment of a real and structured Portuguese-Spanish association, within the framework of the Protocol of 1998 which was still in force.

The *CLESD* is structured at three levels: (a) the Council; (b) the Preparatory commission; and (c) the Working Groups: Political-diplomatic dialogue, Political-strategic dialogue, and Peninsular General Staff. The VI *CLESD* (Meeting of the Council) took

35 *Position paper for multilateral cooperation in the Gulf of Guinea*, presented in Brussels on 22 May 2015.

place in May 2017, parallel with the bilateral Summit in Vila Real, and the 61st Peninsular General Staff Meeting in November.

On balance, its functioning is very positive, but there is a wide margin for improvement. The main difficulty lies in the form taken by the intermediate level, the Preparatory Commission, responsible for preparation of the meeting of the Council based on the results obtained in the Working Groups. This Commission, or “meeting of eight”, should be formed by the foreign policy and defense policy General Directors, the armament General Directors, and the Chiefs of the Defense General Staff, but it has never met because of the difficulty in coordinating the agendas of these authorities. On the other hand, the only working group that holds regular annual meetings and undertakes an effective follow-up of cooperation is that of the Peninsular General Staffs, where the military aspects of cooperation are dealt with.

In order to achieve maximum performance from bilateral cooperation, it is necessary to solve these structural deficiencies which, in the end, are limiting deficiencies. An efficient model should be the establishment of a bilateral strategy of cooperation, holding objectives within different time contexts. It is a question of building an integral project, with efficient management, control and evaluation organs, which would permit the alignment of political positions, integrate military forces, and coordinate defense industries.

The project is conceptually defined and is now provided with the adequate judicial framework through the Bayona Agreement. The current political, economic and security situation in the EU creates an opportunity window for consolidation of cooperation. Thus, it is essential to continue strengthening trust, to avoid haste, and to identify the areas of complementarity within the two countries.

Giving shape to cooperation: Projects, activities and operations.

According to the Bayona Agreement *and* declarations at successive *CLESD*, the possibilities of peninsular cooperation in security and defense can be as broad as both countries decide: cooperative defense; agreement of national positions; common actions in the international sphere; common and reinforced capabilities; maritime security; management, education, training and exchange of personnel; undertaking of joint exercises; joint management of emergencies and catastrophes; cooperation in joint-mixed operations; joint actions in the areas of technology and industry; cooperation in cyber-defense and in the fight against global terrorism; energy challenges and climate changes; cooperation in geographic and hydrographic activities; and even the promotion of historical and cultural activities.

COOPERATION PORT-SP AT THE REGIONAL LEVEL	
FORCES AND MIS-SIONS Mixed participation	6) NATO VJTF 2018. 7) <i>EU Battlegroup</i> 2019 and 2021. 8) Operation INHERENT RESOLVE (Iraq). 9) EUTM Mali and EUTM RCA. 10) Multilateral cooperation in the Gulf of Guinea.
PROJECTS WITH THE PARTICIPATION OF BOTH COUNTRIES	
P&S (EU)	6) European Air Transport Fleet (EATF). 7) Joint Deployable Exploitation and Analysis Laboratory (JDEAL). 8) Single European Sky ATM Research (SESAR). 9) Maritime Surveillance (MARSUR). 10) Future Governmental Communications via satellite.
PESCO (EU)	4) Military mobility 5) Shared information platform for cyber-threats and response to incidents. 6) Strategic System for Command and Control (C2) for missions and CSDP operations.
SD (NATO)	7) Cluster for the protection of ports. 8) NATO multinational education and training on Cyber-defense (MN CD E&T). 9) Air-land guided precision weapons. 10) Maritime support tankers. 11) Maritime situational information – International Maritime Information Services (MNMIS). 12) <i>SOF Aviation</i> .

Table VII – Cooperation PORT-SP at the regional level

Source: Elaboration by the author based on Minutes from the 61st Peninsular General Staff Meeting (2017)

Among on-going activities at the regional level (Table VII), the coordinated generation of reaction forces within the framework of the EU (EUBG) and of NATO (VJTF, NRF) stands out, as well as the coordinated contribution to multilateral operations in Iraq (Operation Inherent Resolve, OIR) and in the Sahel (EUTM Mali and EUTM RCA). Furthermore, the two countries jointly participate in the development of P&S projects led by the EDA, in NATO SD projects, and in the PESCO projects recently approved by the EU.

The coordination of positions designed to reinforce the importance of the Southern flank of the EU and NATO stands out in the sub-regional area. This is particularly important in a divided Europe regarding the perception of threats because the successive increase of EU and NATO members has moved the European center of gravity towards the East (Drent et al., 2015, 8). Thus, the Northern and Eastern countries in Europe focus their defense on Russia and the crisis in Ukraine, as opposed to Portugal, Spain and other Mediterranean allies such as France and Italy, that show greater concern with respect to the South, justified by the consequences of the Arab Spring, the spread of jihadist terrorism and illegal immigration.

The number of bilateral activities is very high and has constantly increased since 2012. The economic crisis has imposed budget limitations in both countries which have found in cooperation a way to deal with some of their shortages.

Evaluation of the model of cooperation in peninsular defense: recommendations

Throughout this study, twelve conditions necessary for the success of cooperation in defense have been listed, which it is now necessary to apply to the peninsular project: trust and solidarity; sovereignty (the capability for action); similar strategic cultures; geographic and cultural proximity; number of members (initially limited); countries and forces of similar size and characteristics; downward and upward process; adaptations in defense culture, organization and concepts; alignment in defense planning; standardization and interoperability; realism, transparency and serious resolutions; and the participation of Parliaments.

Trust and solidarity are considered the most important conditions for the undertaking of mixed operations (Rivero, 2017, 2-5). From the declarations at the *CLESD*, the circumstance of the mixed generation of the EUBG and VJTF forces; the cooperation and exchange of information that exists in the Gulf of Guinea; the joint contribution to the fight against international terrorism in Besmaya, as part of Operation Inherent Resolve; the coordination of efforts in the EUTM Mali and EUTM RCA; as well as the maintenance of common stances before NATO and the EU, are strong evidence of the real existence of this condition between Portugal and Spain.

Sovereignty has a special relevance in the peninsular case for several reasons: wariness on the part of Portugal regarding an excessive economic dependency and the loss of international prominence in favor of the senior EU member (Gómez, 2017, 13-14); the issue of the demarcation of the Exclusive Economic Zone (EEZ) between Madeira and the Canary Islands, due to the Salvage Islands being regarded as an inhabitable area (Fiott, 2015, 49-54, 83-86); or the issue of Olivenza³⁶ (Díaz, 2016, 5 March). Sovereignty being understood as the “capability for action”, cooperation on defense becomes a necessity. Vicinity, shared culture and similar languages facilitate understanding and the success of cooperation.

Portugal and Spain currently have converging strategic cultures, as evidenced by: their postures vis-à-vis the *CSDP* and NATO; their 360° vision and the importance given to the Southern flank; their participation in initiatives such as the Defense 5+5 Initiative, and ongoing mixed operations. However, the existence of exclusive strategic interests is a fact (Portugal’s position in the Community of Portuguese Language Countries, independent cities and territories of Spanish sovereignty in Africa), which, if not properly considered, could limit the scope of the common project.

The existing asymmetry between the economies and the military capabilities of Spain and Portugal is a reality (Table VIII), which could be limiting because of reservations regarding the predominance of the senior EU member, or due to a limited retribution of the junior EU member. As other European examples show, mutual trust

36 Olivenza is considered an international conflict area by the CIA.

and understanding, correctly identifying the areas of complementarity, can annul the negative effects of this asymmetry (the examples of Germany-the Netherlands, Belgium-France, Germany-Denmark). The flexibility of the peninsular bilateral model permits establishment of a modular type of cooperation, integration and specialization, going forward within the new PESCO project in the EU.

	PORTUGAL	SPAIN	RATIO
BUDGET 2017 (M€)	2,185	8,623	1:4
Armed Forces	32,992	121,000	1:3.7
Total number of troops			
Army (Land forces) <i>Exército / Ejército de Tierra</i>	18,000	77,000	1:4.3
Troops Large Units	Intervention Brigade (<i>Brigada de Intervenção</i>) Armored Corps Brigade (<i>Brigada Mecanizada</i>) Rapid Reaction Brigade (<i>Brigada Reação Rápida</i>)	Headquarters/LCC (Valencia) SAN MARCIAL Division: 4 Brigades CASTILLEJOS Division: 3 Brigades The Canary Islands Brigade Ceuta Brigade Melilla Brigade Helicopter Brigade (<i>FAMET</i>) Logistics Brigade Sanitary Brigade	
Navy (<i>Marinha / Armada Española</i>)	9,000	21,000	1:2.3
Troops Main ships	05 Frigates 06 Corvettes 02 Submarines 01 Logistics Ships Naval Fusiliers Corps (<i>Corpo de Fuzileiros</i>)	01 Aircraft carriers (LHD) 11 Frigates 07 Corvettes 04 Submarines (project S-80) 02 Logistics Ships 03 Transport 02 Amphibious ships Marine Corps Brigade	
Air Force (<i>Força Aérea / Ejército del Aire</i>)	7,000	20,000	1:2.9
Troops Main means	27 F16 06 C130 11 C295 05 P3 Orion 06 EH-101 Helicopters 06 Air Rescue Service (<i>SAR</i>) Helicopters	73 EFA 86 F18 02 A310 12 C130 18 CN-235 18 C295 07 P3 Orion 18 CANADAIR 29 Cougar Helicopters 15 Air Rescue Service (<i>SAR</i>) Helicopters 04 UCAV <i>Reaper</i>	

Table VIII – Comparison of PORT/SP capabilities

Source: Elaborated by the author based on information from the Spanish Ministry of Defense, 2017. National Ministry of Defense of Portugal, 2017.

Maintenance over time of strong leadership at the political and military levels (downward and upward process) is essential. At this point, democratic alternation

within governments is critical; an alternation might substantially change the strategic culture. The establishment of mutual dependencies and the consideration of cooperation as “State Policy” on a long-term basis could contribute to minimize the effects of such alternation.

Although there may be initial differences between the defense cultures, the organization of the Armed Forces and the concepts of employment and of doctrine, effective cooperation demands the progressive evolution of “national thought” towards “multinational thought”, influencing the consideration of defense priorities. The exchange of liaison officers between General Staffs and of students, the realization of mixed exercises and the joint launching of projects contribute to reducing the problem. Time and an understanding disposition are necessary.

Permanent forms of cooperation call for progressive alignment of defense planning. Mutual dependencies are strengthened when the partners use the same equipment; this results in greater interoperability of their forces and strengthens the model as a result. Transparency is a prerequisite, those responsible for planning thus being forced to seek, first and foremost, potential for multinational cooperation.

Standardization of doctrine and interoperability of equipment is directly related to the ease of establishment of cooperation, because it allows integration of training, supply, maintenance and acquisition of spare parts more easily (an example of this is that of the *European Participating Air Forces*, constituted among the MS that operate F16 fighters in the EU). Portugal and Spain share the NATO doctrine and a strong facility for understanding that contributes to strengthening cooperation.

Reality is also an important condition for success. The Bayona Agreement includes many areas for cooperation that must be developed with clear and attainable goals. Therefore, there is no room for symbolic purposes. Furthermore, the initiatives must be solvent in budgetary terms, and in the assumption of political risk (partial loss of sovereignty and tensions in the defense industry), which is in direct relation to the depth of cooperation. The full activation of the *CLESD*, in its political and industrial aspects, is essential in order to move forward.

The last condition to be considered refers to the participation of the national Parliaments in everything regarding the projection of forces, defense planning, and acquisitions. For real and efficient cooperation, it is necessary to make such cooperation State policy, something which today is undoubtedly a challenge, at the peninsular level.

Conclusions

Cooperation in defense matters is essential for the MS of the EU at this moment. It is not possible to develop nor to maintain alone the military capabilities that guarantee the security of citizens, given the security, economic and political environment in the last decade. In view of the reality of the situation described, most recently precipitated by Brexit and the warning from the USA stemming from systematic non-compliance

with European responsibilities regarding defense matters, the EU has been forced to react. This has given rise to the establishment of three focal points: the increase of the CSDP, promotion of the development of capabilities, and strengthening of the European defense industry.

The EU is made up of a very heterogeneous group of MS, which has made it difficult to launch an efficient CSDP because this has always been subject to the decisions and reticences characteristic of States with divergent interests. The lack of effective coordination, in spite of the efforts made by the EDA and NATO, has given rise to multiple redundancies and investments based on national interests. Furthermore, the defense industry has not had a competitive and profitable market, having gradually lost its position of prominence.

The causes of the problem include fear of specialization and of loss of sovereignty, differing strategic cultures, or the protectionism of the defense industry itself. However, all of this has been progressively overwhelmed by the demands of reality, making it essential to evolve from the concept of “independent action” to that of “capability for action”. This has been carried out by the MS of the EU in two ways at different speeds: regional and sub-regional.

The regional way has always been the most complicated because it requires the agreement of all those involved, due to which reason it was slowed down until 2017, when the new Global Strategy, its Implementation Plan, the Joint EU-NATO Declaration, the Defense Plan for Action, and the creation of a European Fund for Defense as well as of an Industrial Development Plan were responsible for its resurrection. This has permitted the recovery of tools such as the PESCO which, in its “inclusive and ambitious” modality, is the latest expression of the community’s response to all the current defense challenges.

The sub-regional way, made up of bilateral or mini-lateral initiatives of variable geometry, emerged as a necessary and flexible alternative in view of the difficult progress of multilateral projects. Based on common aspects among closely related members, it has taken on several forms with differing results, not always in line with the regional objectives, and often limited to the satisfaction of national interests.

In this complex environment, bilateral cooperation has emerged in defense matters between Portugal and Spain, which in spite of being two of the MS of the EU and NATO allies most chastised by the economic crisis, have made outstanding contribution to operations by both organizations. Not without reason, in spite of their reduced defense budgets, they currently lead EUTM Mali and EUTM RCA; have jointly generated and led the EUB 2017/2 and VJTF 16, having the EUBG 2019 and VJTF 18 assigned; and participate notably in the *Atalanta* (whose OHQ will likely be in Rota), *Sophia*, *Assurance Measures* operations, and missions of the Air Police in the Baltic, among others.

The peninsular bilateral project, which has undergone unprecedented development in the last decade, is equipped with a top-level, flexible and inclusive judicial framework in the Bayona Agreement, wherein the intention to cooperate in order to

“improve regional security and defense within NATO and the EU” stand out. It is precisely that multilateral orientation, together with mutual understanding and trust that has permitted diffusion of the limitations of sovereignty so as to establish a project convergent with regional objectives. This has been demonstrated by the coordination of positions of the two partners throughout the process of the new impetus in European defense, leading to the conclusion that it is a positive contribution.

Defense cooperation between Portugal and Spain is natural and necessary, justified by common interests and shared threats. However, in order to be truly efficient, it needs to improve the structure of its performance, to have permanent management, evaluation and control organs, to activate all their potentials, and to establish a multidisciplinary dialogue that still does not exist in areas such as armament and the defense industry. On balance, it should be a strategy of real cooperation, enjoying the necessary budgetary support, and backed by a solvent State policy.

The results obtained from cooperation are producing benefits for both countries and for the common European defense to which it contributes. Considering that it is an asymmetric model, it is necessary to maintain the concept of a relationship between equals and of mutual trust, ensuring reciprocal benefit for both parties. Portugal and Spain may currently be one of the best examples of understanding and constructive collaboration in security and defense matters in Europe.

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