ARMoured vehicle requirements and programmes in Europe
The downturn in the world economy was of course particularly resonant in Europe and it is no secret that most defence budgets have been significantly cut back in the past few years. However, expenditure on land force assets during the Afghanistan conflict has seen many of these militaries provided with a range of new vehicles to cope with the extremes of the environment and the ubiquitous IED – the number one killer of coalition forces throughout the campaign. As a result, many new personnel carriers and fighting vehicles were gleaned through Urgent Operational Requirements and have outfitted fleets with heavily protected solutions focused primarily on new survivability measures.

With the drawdown, European NATO nations are now collectively looking at readdressing the purpose for their land forces and are concluding that mechanised units should remain at the core of any future force structure. The British Army's recent 2020 strategy, for example, places infantry and logistics into a purely supporting role to three main mechanised brigades. The major issue is what capabilities will be required for potential future engagements to avoid the same situation that the early years of Afghanistan posed: forces woefully lacking in vehicles that met the specific threats of theatre. Without the benefit of a crystal ball, horizon scanning is incredibly challenging and, coupled with enduring budget limitations, there remains a question over whether the vehicles acquired by European forces in response to Afghanistan should – or could – be scrapped without a great deal of controversy. Yet, if plummeted into a new conflict environment, there may be significant risk in keeping vehicles in service that are outfitted to suit a different situation.

While Europe is unlikely to return to the days of high intensity large-scale land warfare seen during the early 20th Century, there remains the possibility of high intensity military force being applied in support of limited political objectives as part of “coercive diplomacy”. The 2008 Georgian conflict provides a relevant example – a short, sharp and politically decisive event that saw large amounts of armoured vehicles deployed in a clear projection of power.

Theoretically, NATO may well require a high end warfare capability to deter these scenarios, while retaining the skills and equipment relevant for asymmetric out-of-area campaigns.
Even as the war in Afghanistan draws to a close, most strategists believe that the IED threat continues to present real challenges and the global defence community now recognise IEDs as a threat even for future non-expeditionary conflicts. In this particular case we are seeing a re-emergence of the IED, such as mines and ordnance, quickly repurposed in other nations, including Libya, Yemen, Pakistan and India. Nations further away, including Colombia, Thailand and Nigeria, are also suffering to combat the problem as it is routinely employed by terror, revolutionary and organised criminal groups. At the same time, the task of integrating protected vehicles into a coherent force development plan is becoming apparent in terms of its scale and potentially its cost. Given another land based conflict involving European militaries, it seems inconceivable that the IED will not play a role in an attempt to even the odds.

The sophistication of anti-tank/armoured vehicle ordnance continues to develop apace and so the sophistication of active protection solutions is also increasing in a like-for-like effort. While infantry weapons do not typically represent more of a threat, the prevalence of RPGs is increasing and is fuelling a boom in applique armour sales.

European militaries must also consider the likelihood of violent public unrest, as experienced in recent years by the UK, Greece and Spain, to name a few. In these instances, both law enforcement and army personnel must be enabled with the option of traversing the streets with close quarters protection in mind, be it safeguards against Molotov cocktails or external CCTV to prevent ambush when leaving the vehicle.

Analysts believe that from 2013-2022, Europe will hold over 30 percent of the global end-user armoured vehicle market [Forecast International], which in theory would make the continent the world’s biggest regional market for vehicle production, in large part due to smart businesses solidifying new partnerships and pre-empting national requirements.

Across the continent, those nations that have seen armoured vehicle expenditure and modernisation halted in response to the economic crisis – including the UK, France, Spain and Germany – have looked to instead develop joint programmes and shared developments as a way to offset the shortfall.
The UK intends to retain its vehicle fleet in a similar structure to that seen in the Afghanistan campaign, flying almost 3,000 vehicles home from Helmand, including the likes of Ridgebacks, Mastiffs and Huskies. Vehicles purchased as UORs, such as Foxhound protected patrol vehicles, will remain within the main order of battle for the foreseeable future. Fleet Management will also be a key goal of the privatised Defence Support Group (DSG) as it supports UK vehicle fleets. The Government has announced that survivability measures will be assessed after the vehicles return from Afghanistan.

Notably, the MoD is spending around £1 billion on the modernisation of Warrior infantry fighting vehicles and announced in September that 24 additional Foxhounds are to be purchased in a $23 million deal, bringing the total number up to 400. At time of writing, Foxhound has logged no combat losses.

More than 1,080 vehicles and pieces of major equipment have been redeployed to the UK from Afghanistan, with a total of around 3,345 vehicles set to be salvaged by 2014.
Germany is predicted by analysts to be the biggest regional spender by value on armoured vehicles over the next 10 years, with its key development the Puma infantry fighting vehicle currently under development by the Krauss-Maffei Wegmann and Rheinmetall consortium. The total number of Puma vehicles on order has dropped from 405 to 350, but as the first production model due for delivery to the German Army in 2014, widespread attention will be on its operational performance.

The consortium is also delivering 472 Boxer multirole armoured vehicles between the Netherlands and Germany on completion of this much anticipated programme.
Italy is preparing to finalise its delivery of all 249 Freccia 8x8 wheeled armoured fighting vehicles to its Army in 2014. The Iveco-manufactured vehicle is also being eyed for a follow-on repeat order should budgets allow, alongside a new order for the Centauro 2 wheeled tank destroyer. In addition, Iveco has finalised development of the SuperAV 8x8 amphibious vehicle in its APC configuration for potential delivery to Italian forces – as the Veicolo Blindato Anfibio (VBA) – and the export market.
Meanwhile, France is holding steady with its acquisition of the home-built VBCI 8x8 armoured infantry combat vehicle, seeing in 500 vehicles by July 2013, many of which have seen action in Afghanistan, Lebanon, and more recently, Mali.
Norway interestingly bucked the trend at the end of 2012 by making one of its largest ever investments into the Army with the announcement of a £500 million deal to upgrade and manufacture 146 CV90 armoured combat vehicles. The programme is set to be completed in 2017 after upgrading 103 current CV9030s and building 41 other new vehicles.
DENMARK

Denmark is in the midst of trials to replace its armoured personnel carrier in what is currently the largest armoured vehicle competition in Europe. Up to 360 vehicles will eventually be delivered but in either a display of open-mindedness or indecisiveness, the competing vehicles are a mix of tracked and wheeled platforms.
Sweden announced in September that it will purchase 100 more BvS10 all-terrain vehicles from BAE Systems Hagglunds in an estimated £100 million deal that adds to the procurement of 48 units agreed in 2012.

The decision will assist Swedish Forces with humanitarian aid and disaster relief (HADR), but can be configured for many other roles, again highlighting the attraction to flexibility that most European nations are now valuing above all else.
In Finland, Patria has unveiled that its next generation Armoured Wheeled Vehicle (AWV) concept is now beginning company trials. The vehicle “leverages” from the current production Armoured Modular Vehicle (AMV) 8x8, of which 1,400 units are already under contract or are being delivered, including 62 in service with the Finnish Defence Forces. Patria previously won a major contract in 2010 to deliver 113 AMVs to Sweden, which will begin fielding in 2014. Finland intends to launch a new competition towards the tail end of 2013 for a contingent of light armoured logistics vehicles.
Further East, Russia has confirmed that it will be proceeding with a delivery of the BMP-3 infantry fighting vehicle, backtracking on previous disagreement in 2010 over the vehicle’s quality.

Although Kurganmashzavod was fined $90 million by the government for failing to meet contract expectations, the vehicle is now understood to have undergone modifications to increase its life expectancy.

On a more forward-thinking note, the Russian Military-Industrial Company has this year completed testing of its newly designed Krymsk APC that is not only intended to be a near-silent hybrid-powered carrier, but is also in planning stages to be remotely operated and to field directed energy weapon systems.
Poland is looking to replace its ageing fleet of Honker, Honker 2000, Skorpion-3 vehicles and UAZ469 jeeps with 1,600 4x4 light multipurpose vehicles in an estimated $60 million programme. Poland has a major requirement for tracked and wheeled vehicles and is anticipated to release an RFP in 2014. In October 2013, it ordered 307 additional Rosomak 8x8 multipurpose armoured vehicles under license by WZM S.A, which are due for delivery by 2019.

Meanwhile, Poland Defence Holdings unveiled a new AFV concept this year. The PL-01 from Obrum and BAE is designed to fulfil Poland’s plan for a Universal Modular Tracked Platform, offering a three-person crew, auto-loading 120 mm main gun, unmanned turret and a proven chassis based on the CV90 in order to meet the intended timeframe for delivery.
“A very good opportunity to quickly and easily take advantage of interesting information from the leading countries and firms within military vehicles.”

- Magnus Hellgren, Product Manager, Swedish FMV, speaking at International Armoured Vehicles 2013

“The opportunity for industry to come together, meet ministers, meet those [in] more markets, who actually want to buy the equipment on offer, who come to discuss innovative solutions to common challenges is absolutely crucial.”

- Peter Luff MP, Former Minister for Defence Equipment, Support and Technology, UK MoD

www.ArmouredVehiclesNorthernEurope.com

28 - 29 April 2014
London, United Kingdom

enquire@defenceiq.com
+44 (0) 20 7368 9737