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European defence industry: urgent action is needed!

By invading Ukraine in February 2022 Russia has thrown the European security order into the waste bin. In essence, the Western reaction has been 'we will not fight, but we will support Ukraine in its war effort'. Western countries have delivered a wide variety of weapon systems. Although this support has been vital for Ukraine's defence, it has resulted in minimum levels of American and European arms and ammunition stocks. As a consequence, the burning question is how to ramp up the defence industrial production, in particular as the armed confrontation in Ukraine has developed into a war of attrition.

The EU has launched several initiatives to support member states in procuring replacement equipment and ammunition to be delivered to Ukraine. At the same time, European countries have to strengthen their own defence capabilities in order to increase their share of the burden of NATO's collective defence, while also realising more European autonomy. In the EU, there is broad political support for the strengthening of the European Defence Industrial and Technological Base, not only for economic reasons but as a necessary precondition for Europe's security. However, despite this urgent call, industrial production is lagging behind, endangering both Ukraine's war effort and the strengthening of European security and defence.

This policy brief assesses how the EU is responding to the urgent challenge of adapting its defence industry to the requirements resulting from the new security environment. The central question is what should be done in order to change gear for increasing the production of ammunition and weapon systems. After assessing the consequences of the changed security situation for European capability needs, the author addresses the steps so far taken by the EU and the challenges lying ahead as the war will continue in 2024 and perhaps even beyond. The final section presents ten concrete action lines to overcome the obstacles for ramping and speeding up European defence industrial production.

New capability needs

For the first time since the end of the Second World War a state-to-state large-scale war is taking place in Europe.¹ Russia, by invading its

neighbouring country Ukraine, has violated the norms and rules of the international order that are recognised under international law as well as agreements that were signed by Moscow. The EU member states and NATO allies have reacted in a remarkable unity of effort to support Ukraine – despite the fact that several countries have not participated in all of the actions that have been

1 The breaking up of Yugoslavia in the 1990s resulted in new independent states, several of which were soon fighting wars, but often demonstrating a mix of interstate and intrastate armed conflict.

undertaken.² The United States and European countries have delivered a wide range of weapon systems and ammunition. This military support – amounting to a total of almost € 98 billion by October 2023³ – has been a key contribution to the success of the Armed Forces of Ukraine (AFU) in halting and repelling the invader. The war has been ongoing for almost two years and has developed into a war of attrition along the confrontation line in the south(-eastern) part of the country and has continued with the massive use of artillery. Furthermore, Russia continues to attack Ukraine with long-range drones and missiles, destroying mainly non-military infrastructure and causing many civilian casualties. Most likely, these two elements will characterise the Russian-Ukrainian war in 2024 and perhaps even longer. It implies a continued demand for Western military support for Ukraine, in particular for air defence and frontline weapons and ammunition.

In addition to supporting Ukraine, NATO has stepped up its requirements for collective defence. The new NATO Force Model implies stand-by readiness forces in different categories, multiplying the old ceiling of the NATO Response Force by a factor of 10 or even more.⁴ The enhanced Forward Presence, in particular in the Baltic countries, will be expanded. For example, Germany is aiming to deploy a combat brigade with about 4,000 troops plus all its equipment and logistical supplies to Lithuania in a few years. Strengthening the Alliance's deterrence and defence posture also necessitates the buildup of sizeable ammunition stocks, both to replace artillery shells and missiles delivered to Ukraine as well as for NATO's own forces. NATO targets

concerning the size of ammunition stocks have already been increased.⁵

For the European nations, the new security environment poses additional challenges. While they are still catching up from the long period of budget cuts, the pressure to adapt and modernise their armed forces for collective defence requires sustained investment. Furthermore, American military support for Ukraine might diminish or even be brought to a halt. In December 2023, the Republicans blocked the approval of President Biden's proposal for a large foreign aid package that included \$ 61 billion for economic and security assistance to Ukraine.⁶ The election campaign and the uncertain outcome of the November 2024 presidential elections cast a shadow over the continuation of US sustained military support for Kyiv. A second term of Donald Trump as US President could lead to another shock for Europe: in order to ensure American military participation in NATO, European allies might have to step up their defence efforts at a much quicker pace. But even under a continued Democratic leadership, the pressure from Washington on Europe to deliver more defence capabilities will further increase due to the shift of American attention to the Pacific area and China in particular.

The growing role of the EU

NATO sets the targets that should guide the defence efforts of the allies. The EU is increasingly involved in financing the development and delivery of military products.⁷ Since 2016, the European Commission has launched several programmes funded by the EU budget. The largest of these programmes – the European Defence Fund (EDF) – is 'up

2 Such as Hungary not even allowing access to its territory for the transfer of military goods to Ukraine and Turkey by not joining the sanctions against Russia.

3 According to the Ukraine Support Tracker Data of the IFW Kiel Institute for the World Economy, up until 31 October 2023 the US had committed € 43.9 billion, the EU member states and institutions € 41.4 bn and other non-EU NATO allies (Canada, Iceland, Norway, Turkey, UK) € 12.4 bn – resulting in a total amount of € 97.7 bn. See: [link](#).

4 Dick Zandee, "NATO's Vilnius Summit: the consequences for the Allies," *Atlantisch Perspectief*, no. 3 (2023): 20-24.

5 Sabine Siebold and Andrew Gray, "NATO to increase targets for ammunition stockpiles as war depletes reserves," *Reuters*, February 14, 2023.

6 Bryant Harris, "[Biden to use last of Ukraine funds this month if Congress fails to act](#)," *Defense News*, December 18, 2023.

7 Once Sweden has joined NATO, only four EU member states remain outside the Alliance (Austria, Cyprus, Ireland and Malta).

and running' (2021-2027) with a budget of € 8 billion. While the EDF is focused on technology development up to the production of demonstrators, the war in Ukraine has lifted the EU's budget allocation in the defence area to the next level: the procurement of weapons and ammunition. The European Defence Industrial Reinforcement through Common Procurement Act (EDIRPA) is aimed at stimulating the common acquisition of military equipment to replace weapons delivered to Ukraine. However, speedy implementation was lacking. It took 16 months from the moment the Commission launched the proposal (July 2022) until the EDIRPA Regulation was adopted by the Council, resulting in the implementation timeframe being delayed by one year (to 2023-2025).⁸ Below follows a closer look at two burning issues for ramping up defence industrial production: ammunition and equipment procurement.

Ammunition

In response to the Ukrainian requests for ammunition, the EU initiated the Collaborative Procurement of Ammunition initiative in March 2023, consisting of three parts. Track 1 is aimed at financing member states' deliveries of ammunition from their own stockpiles, while track 2 finances the procurement of ammunition to be delivered directly from industry to Ukraine. For both tracks an amount of € 1 billion is available, financed by the European Peace Facility (EPF).⁹ Track 3 has the purpose of stimulating European defence industries to ramp up their ammunition production (artillery and missiles). In July 2023, the Council and the European Parliament agreed on the content of the Act in Support of Ammunition Production (ASAP) with a € 500 million budget, as proposed by the European Commission. In October 2023, the Commission adopted the implementing decision, which foresees the allocation of almost € 470 million in grants for enhancing the production of explosives, powders, shells

and missiles, and € 30 million for a Ramp-up Fund. This fund is intended to make it easier for companies to access public and private financing, and to speed up investments that are needed to increase manufacturing capacities.¹⁰

The continuation of the war of attrition between Russia and Ukraine will result in Kyiv's huge demand for ammunition from Western suppliers. At the end of 2023, the number of expended artillery shells fired per week by Ukraine had dropped to 2,000, while Russia was able to fire 10,000 shells every week. With increased production by its own defence industry and with imported shells from North Korea, it is expected that Russia will be able to fire up to one million shells in 2024.¹¹ That figure would translate into the ability to fire almost 20,000 shells per week. What can the West deliver to Ukraine? In the US, production was doubled to 28,000 shells per month in 2023 and the figure will steadily grow to 100,000 per month (or 20,000 per week) in 2026.¹² In March 2023, the EU announced that it would deliver 1 million 155mm shells annually under the Collaborative Procurement of Ammunition initiative. By October 2023, approximately 300,000 rounds had so far been delivered and the EU member states have placed orders for another 180,000 shells.¹³ EU High Representative Borrell stated that European industry is capable of producing up to 1 million shells by March 2024, but admitted that this goal will not be reached based on the current orders. He accused industry of still exporting 40 percent of their production around the world instead

8 Furthermore, the budget has been reduced from € 500 million to € 300 million. See: [link](#).

9 The EPF is financed by the member states outside of the EU budget, with financial contributions based on the GDP key.

10 European Commission, [Commission Implementing Decision of 18.10.2023 on the financing of the instrument on supporting ammunition production \(ASAP\) established by Regulation \(EU\) 2023/1525 at the European Parliament and the Council and the adoption of the work programme for 2023-2025](#) (Brussels, October 18, 2023).

11 Jack Waitling, ["Yes, Ukraine can still defeat Russia – but it will require far more support from Europe,"](#) *The Guardian*, 27 December 2023.

12 Jen Judson, ["US Army awards \\$ 1.5 B to boost global production of artillery rounds,"](#) *Defense News*, October 6, 2023.

13 Joe Barnes, ["EU delivers only a third of one million artillery shells promised to Ukraine,"](#) *The Telegraph*, October 26, 2023.

of delivering these shells to Ukraine.¹⁴ This ‘naming and shaming’ press statement triggered a response from the Aerospace and Defence Industries Association of Europe (ASD), stating that existing contracts cannot be changed that quickly and that European countries should guarantee long-term contracts that are needed for expanding production capacities.¹⁵ These facts prove that ramping up ammunition production is not just an industrial problem; above all, it requires governments to adapt from a peacetime approach in ordering ammunition to wartime conditions. In short, the US and Europe can together produce at least the same amount of artillery shells for Ukraine as Russia is capable of firing, but the pace of speeding up production is currently too slow.

The ammunition initiative is aimed at the short term. For the longer term, both the High Representative and the Commission have made proposals. In July 2023, Josep Borrell launched a plan to make € 5 billion available in each of the coming four years (2024-2027) via the EPF to finance military equipment and ammunition to be delivered to Ukraine.¹⁶ Most member states concur that a dedicated Ukraine Assistance Fund should be created as part of the EDF¹⁷, but there is no agreement on the financial volume thereof. Even worse, Hungary has raised difficulties for the allocation of the last EPF tranche of the available € 5.6 billion for military support to Ukraine.¹⁸ The new government in Slovakia – opposing the delivery of weapons to Ukraine –

might further increase this problem. Although the use of the EPF remains the preferred option as it underscores EU solidarity and unity, alternative options should be considered in case opposing member states block the allocation of new tranches. One option would be to explore the application of the Category B (opt-in) formula of the European Defence Agency, which has been designed as a flexible format ‘of the willing’ and for which the EDA’s Steering Board agrees with qualified majority voting.¹⁹

Equipment procurement

EDIRPA is a short-term programme. The European Commission is developing the content of the European Defence Investment Programme (EDIP) as its successor. The EDIP is to cover the period up to the end of the current Multi-annual Financial Framework (2027). Originally, the EDIP proposal should have been presented in the autumn of 2023, but the EU Commissioner for Internal Market, Thierry Breton, postponed the launch of the plan to the first quarter of 2024.²⁰ The Commissioner has stated that the EDIP “must include a regulatory framework to support security of supply and the production of defense equipment – a type of ‘European Defense Production Act’”.²¹ In early January 2024, Breton advocated a €100 billion EDIP, a financial volume 333 times that of EDIRPA.²²

At the same time, the Commission is preparing the European Defence Industry Strategy (EDIS), for which a series of consultations with member states, industry, the financial sector and other stakeholders will be organised.²³ Capability

14 [“Foreign Affairs Council \(Defence\): Press remarks by High Representative Josep Borrell after the meeting,”](#) European external Action Service, November 14, 2023.

15 Tom Kingston, [“Industry group rejects EU blame in missed ammo target for Ukraine,”](#) Defense News, November 17, 2023.

16 Jorge Liboreiro, [“EU pitches € 20-billion plan in long-term military support for Ukraine,”](#) EuroNews, July 20, 2023.

17 [Beantwoording schriftelijke vragen over de Raad Buitenlandse Zaken met ministers van Defensie op 14 november 2023](#), Brief van minister van Defensie drs. K.H. Ollongren aan de Voorzitter van de Tweede Kamer der Staten-Generaal, November 13, 2023.

18 Nate Ostiller, [“Hungarian FM: Budapest will block next tranche of EU military aid for Ukraine unless it receives ‘guarantees’,”](#) The Kyiv Independent news desk, November 13, 2023.

19 The Council of the European Union, [Council decision \(CFSP\) 2015/1835 defining the statute, seat and operational procedures of the European Defence Agency \(recast\)](#) (October 13, 2015): articles 9-2 and 20.

20 Caleb Larson, [“Breton wants more time on EU defence investment plan,”](#) Politico, October 17, 2023. Olivier Jehin, “The defense industrial strategy and the EDIP are for 2024. Report confirmed,” *Bruxelles 2*, October 17, 2023.

21 Olivier Jehin, “An ambitious EDIP, pillar of the defense industrial strategy,” *Bruxelles 2*, October 10, 2023.

22 Eddy Wax and Laura Kayali, [“Breton aims for ‘huge’ €100B defense fund,”](#) Politico, 9 January 2024.

23 Olivier Jehin, “The defense industrial strategy and the EDIP are for 2024. Report confirmed.”

priorities will be based on the renewed Capability Development Plan, adopted by the EDA Ministerial Steering Board on 14 November 2023. It lists 22 capability priorities, among them integrated air and missile defence, ground combat capabilities and underwater & seabed warfare and others.²⁴ The war in Ukraine and other threats to European security have clearly had their impact on the new list of capability priorities. This will have an effect on defence industrial production.

Ten action lines for success

Ramping up defence industrial production in the EU is an urgent and key requirement. First, to be able to support Ukraine in its war with Russia. European security is at stake, as political leaders repeatedly state. Thus, the EU and its members states should change gear and invest even more in defence and the production of equipment and ammunition. Second, new NATO requirements and American pressure on Europe to deliver a large share of the collective defence burden also require investment and a ramping up of defence industrial production. Without a strengthened European Defence Technological and Industrial Base, Europe will put these two key objectives at serious risk.

Despite rising defence budgets, the current pace of ramping up industrial production is too slow to cope with these challenges. In order to move at high speed, many prerequisites will have to be fulfilled. The central and overall requirement is to change the still existing peacetime approach of ordering equipment and ammunition. It contradicts the radically changed global order, the wartime situation of Ukraine and the EU's commitments to continue the delivery of military support to the country. Ramping up defence industrial production for the sake of Ukraine's survival and for European security requires a (semi-)wartime approach to strengthening the EDTIB in order to deal with the urgent demand.

Various elements have to be included in such a (semi-)wartime approach to defence industrial production. Here follows a list of ten elements for which urgent action is needed.

1. The **Collaborative Procurement of Ammunition Initiative** requires EU member states to speed up orders and contracts with the defence industry for delivering to Ukraine the 1 million artillery rounds and missiles as promised in March 2023. For the period thereafter, decision-making on the **Ukraine Assistance Fund with a sizeable budget** enabling large-scale deliveries of ammunition should be speeded up. If one or more EU member states delay or block the decision to incorporate this fund within the European Peace Facility, alternative solutions should be explored under an ad hoc arrangement. One option is to use the **Category B (opt-in) projects format of the European Defence Agency**.
2. Defence industries need **long-term guaranteed contracts** for enhancing their production capacities. Investing in additional production infrastructure and a growing skilled labour force is too risky without such guarantees. At a minimum, **a 10-year horizon is required**. The current 7-year time limit of the EU's Multi-annual Financial Framework, running out in 2027, is too short. The MFF should be stretched out over a longer timeframe or an exception should be made for defence with a 10-year horizon. Member states themselves should aim for a long-term national defence investment fund with the same horizon, ensuring that election outcomes and other factors do not unravel planned acquisitions.
3. The record of collaborative procurement may be better than is often depicted²⁵, but nevertheless the fragmentation of national demand continues to fuel the fragmentation of procurement and industrial production. Member states still have to make a giant

24 "EU Defence Ministers agree to prioritise 22 military capabilities to bolster European armed forces," European Defence Agency, November 14, 2023.

25 See: Jan Joel Andersson, "[Buying Weapons Together \(or not\) – Joint defence acquisition and parallel arms procurement](#)," European Union Institute for Security Studies, April 3, 2023.

leap forward in **enhancing European collaborative procurement**. The increase in defence budgets has led to urgent orders for equipment – bought off the shelf in Europe, Israel, the US and even South Korea – without almost any multinational coordination. As a result, the armed forces of European countries will continue to be equipped with a wide range of different weapon systems and each with their own logistical tail. More money is not enough: **member states should synchronise their defence planning** in order to optimise opportunities for collaborative procurement which will help to overcome industrial fragmentation. This can be best realised **at the bilateral or minilateral level**.

4. Enlarging and speeding up defence industrial production requires a **review of defence acquisition rules and procedures**. Most countries have long cycles of defence planning and procurement decision-making. Even off-the-shelf acquisition takes several years to complete. The EU has made progress, as shown by the relatively rapid adoption of the ASAP Regulation and the EPF-financed tracks 1 and 2 of the collaborative ammunition procurement. Some member states have changed to **fast-track acquisition**, such as for rocket artillery and missile defence.²⁶ Nevertheless, speeding up procurement cycles in a structural way requires further action. Member states also need to invest in **more human resources for contracting** and for **accelerating the timeframe needed for the certification** of weapon systems.
5. While governments are the single customers of defence products, industry needs **financial support from banks and other financial institutions**, in particular for investment in new infrastructure for ramping up production. Banks, pension funds and other financial

organisations have become reluctant or even refuse to invest capital in defence industries – often under pressure from shareholders influenced by outside actors protesting against their businesses and arguing that transparency is lacking. **The European Environmental, Social and Governance (ESG) agenda** generates additional challenges. Fighter aircraft, armoured vehicles and naval vessels have a more limited scope for becoming ‘greener’ compared to their civilian counterparts. Adapting to climate change requirements is taken seriously by the defence customers and industrial suppliers²⁷, but it should be understood that very ambitious targets cannot be met at the same speed as in the commercial sector. The defence industry has to be treated as a specific economic sector, as underlined in the November 2023 statement by EU defence ministers.²⁸

6. Furthermore, the **defence industry itself should further adapt to the new situation**. Many large companies have already created holdings, have merged or are setting up other cooperation structures.²⁹ The next

27 For an industrial overview, see: *ASD Considerations on Sustainability and the European Defence Industry*, Positions Paper – Aerospace and Defence Industrial Association of Europe, October 6, 2023.

28 *Strengthening the EDTIB’s access to finance and its ability to contribute to peace, stability, and sustainability in Europe*, EDA Steering Board Joint Statement, EDA 202311066, November 14, 2023.

29 Some examples: Krauss Maffei Wegman (Germany) and Nexter (France) have created a joint venture KNDS in view of the Franco-German Main Ground Combat Systems (MGCS) programme. The French Naval Group and the Italian Fincantieri have established Naviris, which is managing the European Patrol Corvette (EPC) programme together with the Spanish Navantia. MBDA is a true European defence company with an industrial specialisation footprint in several European countries. The seven largest shipbuilding companies in Europe, other industries, technology institutions and eight member states have established Sea Defence in May 2023 to work together on the next generation naval platforms. Airbus Defence, Dassault (France) and Leonardo (Italy) are developing the Eurodrone, a Medium-Altitude Long-Endurance Unmanned Aerial System to be procured by Germany, France, Italy and Spain. Rheinmetall has bought the Spanish munitions producer EXPAL and is planning to open up production facilities in Ukraine.

26 The Netherlands has ordered the PULS rocket artillery system from Elbit in Israel. Germany is buying the Arrow-3 missile defence system from Israel and will be the only European country operating a missile defence system with exoatmospheric reach.

steps should lead **to transferring from ‘sharing the industrial cake’ to ‘industrial specialisation’** with merged companies agreeing on ‘who should produce what for all’. Airbus Defence and the European missiles company MBDA have already created such a model. Special attention should be given to Eastern Europe, where defence companies are more specialised but are also isolated from the rest of the EU member states.³⁰ The most challenging aspect is connecting **Small and Medium-sized Enterprises (SMEs)** to the platform producing companies that are predominantly located in the larger EU member states. The European Commission applies specific conditions for involving SMEs across borders in EU-funded projects, but many multinational programmes – such as for instance the Future Combat Air System (FCAS) – remain outside the EU.

7. As a consequence of the former prerequisite – as well as the need to increase collaborative procurement – **national governments have to engage more with their national defence industrial base.** In southern European countries, the connection between ministries of defence and the defence industry is traditionally strong. In western and northern Europe, governments have often applied the free market philosophy to the defence industry sector, which by its nature and under the application of Article 346 of the Treaty on the Functioning of the European Union (TEU)³¹ cannot be put on the same footing as the non-defence industry. The **early involvement of the national defence industry in collaborative procurement programmes** serves a double purpose: exploring what industry can best contribute to satisfying military demands while at the same time arranging an industrial capacity-based

division of labour among companies in the supply chain across borders.

8. To steer the strengthening of the European Defence Technological and Industrial Base, the Commission – after closing the consultation process – should propose a **European Defence Industry Strategy (EDIS)** that addresses all relevant obstacles and proposes actions to remedy the related problems. The EDIS “could provide further guidance on how to link capability and technology needs with industrial capacity.”³² Furthermore, the EDIS should steer the connectivity of the defence sector towards European legislation for reducing dependencies on resources (the Critical Raw Materials Act), semi-conductors (the Chips Act) and others in order to improve the security of supply. In that context, the input stemming from the **Observatory of Critical Materials** is critical. To speed up the work of the Observatory, it should be given high-level political attention and guidance. National (defence) technology institutions could be brought together in a **European network** to build expertise at the EU level. Furthermore, the Strategy could guide the creation of a **European Industrial Advisory Group** in order to connect the defence industry to the national defence procurement actors and the relevant EU institutions.³³ Defining a specific **dedicated ESG approach for defence industries** could be another action point resulting from the EDIS.
9. An **ambitious European Defence Investment Plan (EDIP)** is required to stimulate European collaboration in procurement on a larger scale. The incentive criteria – such as a minimum of three member states and industries based in three EU countries – have been elaborated and successfully tested

30 Lucie Béraud-Sudreau and Lorenzo Scarazzato, [Beyond Fragmentation? Mapping the European Defence Industry in an Era of Strategic Flux](#), (Brussels School of Governance – Centre for Security, Diplomacy and Strategy, July 2023).

31 By invoking Article 346 TEU member states can exempt the procurement of defence equipment from the open market rule.

32 Daniel Fiott, [Purchasing Power: Towards Joint Procurement and Planning in European Defence?](#), (Brussels School of Governance – Centre for Security, Diplomacy and Strategy, September 22, 2023), 4.

33 In the Alliance, the NATO Industrial Advisory Group (NIAG) serves that purpose.

so far. Sizeable funding is lacking, however. In order to attract national investment for collaborative procurement, **the EDIP fund should amount to at least € 100 billion, as suggested by Commissioner Thierry Breton, instead of the € 300 million** as is the case with EDIRPA. Particular attention should be given to investing in the acquisition of critical enablers such as intelligence and strategic reconnaissance.³⁴ The EDIP should be linked to **dual-use production and procurement** financed by other resources. There is **tremendous scope in sectors such as space, communications, intelligence, infrastructure protection, transport and others**. A fresh look at how to connect better military requirements to civilian-driven innovation and procurement would be advisable.

10. The growing role of the EU in defence procurement should **not lead to the creation of new institutions**. In addition to multinational ad hoc programme arrangements, two European organisations are available.³⁵ The Organisation for Joint Armament Co-operation (Occar)³⁶ is a treaty-based procurement agency with an established record of managing multinational programmes such as the A400M military transport aircraft, the Boxer armoured vehicle and the Eurodrone.³⁷ The **European Defence Agency's role** in programme management is focused on research & technology or coordination between countries purchasing

equipment or ammunition off the shelf. As not all EU member states might aim for Occar membership, the potential for the **EDA to manage procurement programmes** involving such countries could be explored. The already existing cooperation agreement between EDA and Occar could be used for early coordination on 'who should manage which programmes'. If EU member states were to give EDA such responsibilities, it would be necessary **to increase the human resources base of the Agency** as the management of multinational procurement programmes requires a considerably larger workforce.

The European Council has underlined the importance of strengthening European security and defence, including a stronger EDTIB, on many occasions. This should be underpinned by **an integrated action plan for ramping up defence industrial production, based on a (semi-)wartime approach** instead of the existing peacetime slow pace. Such an action plan, well funded and supported by national action implementation agendas, should encompass all relevant aspects as stated above in the ten action lines. This would serve the interests of Europe in supporting Ukraine in its continued war with Russia, while at the same time strengthening European military capabilities. After all, without stronger military forces, more strategic sovereignty in European defence will remain nothing more than a dream.

34 See also: Jan Joel Andersson, "[Building weapons together \(or not\) – How to strengthen the European defence industry](#)," European Union Institute for Security Studies, November 16, 2023.

35 The NATO Support and Procurement Agency (NSPA) is another organisation that has managed European procurement programmes. A recent example is the pooled acquisition of the Airbus 330 Multi-Role Tanker Transport (MRTT) aircraft for six participating countries. See: [link](#).

36 The acronym stems from the French name: Organisation Conjointe de Coopération en matière d'Armement.

37 The Occar member states are: Belgium, France, Germany, Italy, Spain, UK. The Occar Executive Administration in Bonn (Germany) had approximately 370 employees in August 2023. See: [link](#).

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www.clingendael.org
info@clingendael.org
+31 70 324 53 84

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About the author

Dick Zandee is leading the Security and Defence programme of the Security Unit at the Clingendael Institute. His research focuses on European security and defence issues, EU-NATO, military forces and capability development, defence industry and other security topics.

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