Europe's Procurement Paradox: How Fragmented Defence Spending Undermines NATO's Deterrence

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Summary

Abstract

This paper examines how inefficiencies in European defence spending undermine NATO’s conventional deterrence. Despite NATO’s new 5% GDP defence benchmark, European allies’ fragmented procurement policies, protectionist practices, and limited cooperation prevent them from achieving economies of scale, rapid innovation, and full interoperability. Existing EU and NATO initiatives—the European Defence Fund, the Defence Production Action Plan, DIANA, and others—represent steps in the right direction but remain constrained by voluntary participation, weak enforcement, and long implementation timelines. The paper argues that these inefficiencies directly affect NATO’s credibility, readiness, and logistical resilience, with consequences for deterrence in a high-intensity conflict. It concludes with a set of actionable policy proposals to reduce fragmentation, including enforceable collaborative procurement thresholds, a NATO-EU joint procurement agency, and stronger accountability mechanisms to align national investments with alliance-wide deterrence needs.

Introduction

NATO’s June 2025 summit in The Hague marked a strategic shift when alliance leaders pledged to raise defence investment to 5% of GDP by 2035, more than double the previous 2% guideline. This historic commitment is intended to shore up conventional deterrence against an assertive Russia. Yet, many analysts warn that simply increasing budgets is reductive and misguided if spending remains inefficient. In practice, Europe’s defence procurement is severely fragmented. Roughly 90% of Allies’ arms investments are channelled into their respective national industries, instead of joint projects.[1] This produces myriad small-batch programmes, duplicated R&D and high unit costs. Uncoordinated national spending may produce limited returns, diverting resources from other public priorities without enhancing capability commensurably. As one commentator notes, focusing on “decimal points in GDP calculations” distracts from Europe’s real needs: *how* the defence budget is spent, not just how much.[2] Paradoxically, rising budgets have so far deepened fragmentation, eroding actual combat power. This is Europe’s procurement paradox: more money, stagnant capability. For NATO, which depends on interoperable, well-stocked armies across the continent, this is a serious vulnerability.

Below we trace the causes and consequences of Europe’s procurement inefficiencies, survey EU and NATO initiatives intended to tackle the problem, and propose policy steps to reverse the trend. Without urgent action to weld Europe’s arms markets together, Europe will struggle to field the credible conventional forces that a confident Alliance requires.

[1] Nathalie Tocci, “The Paradox of Europe’s Defense Moment”, *Texas National Security Review*, 6.1 (Winter 2022/23), 99–108, https://doi.org/10.26153/tsw/44441.
[2] Andrea Napolitano and Danny Wagemans, “Europe’s Defence Crisis: Why More Spending Alone Will Not Keep the Continent Safe”, *Social Europe* (12 March 2025), https://www.socialeurope.eu/europes-defence-crisis-why-more-spending-alone-will-not-keep-the-continent-safe

Europe’s Fragmented Defence Markets

European defense remains deeply nationalized. Member states overwhelmingly buy from their own firms, often shielding them under TFEU Article 346, which exempts defense contracts from normal competition rules.[3] As a result, only about 9% of awarded military contracts in Europe go to firms in other EU countries; over three-quarters stay with domestic producers. In practice, the EU defence “single market” barely exists, and procurement for the continent’s 27 armies still operate mostly in isolation.

This fragmentation has a clear cost. When each country orders on its own timetable and specifications, production runs are bound to remain small and per-unit prices high. For example, the EU now has five times as many variants of each weapons system as the US, and more than 60% of European-made weapon types are used by only one country.[4] When Kyiv requested howitzers, it received more than ten different models from EU allies. Even though most of these were NATO-standard 155 mm guns, their design differences meant that some were more or less compatible with certain shells — a logistical nightmare.[5] Such duplications and lack of cooperation cost the European bloc €25–100 billion per year in 2021, according to the European Commission.[6]

Fragmentation directly undermines NATO’s conventional power. When crises strike, European armies scramble to refill stocks individually, often coming up short. For example, after Russia’s 2022 invasion the EU pledged roughly €75 billion in military aid, but about 80% of that equipment had to be sourced outside Europe, overwhelmingly from the United States. NATO’s Strategic Concept stresses that deterrence depends not on how much is spent, but on having the right capabilities ready.[7] Europe’s efficiency shortfall means that rising defence budgets risk yielding diminishing returns on the battlefield.

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[3] Nicole Koenig and Leonard Schütte, “Chapter 4 – Procurement Processes: Spending Together”, in *Defense Sitters: Transforming European Militaries in Times of War* (June 2023), https://securityconference.org/en/publications/special-editions/defense-sitters/procurement-processes/

[4] Napolitano and Wagemans, “Europe’s Defence Crisis”.

[5] Michael Peck, “Ukraine Has 14 Kinds of Howitzers to Batter Russian Forces, but Each Gun Brings a New Problem for Kyiv”, *Business Insider*, 12 July 2023, https://www.businessinsider.com/ukraine-artillery-arsenal-creates-logistical-maintenance-problems-2023-7.

[6] European Commission, *The European Defence Fund* (factsheet), April 2021, accessed 29 September 2025, https://defence-industry-space.ec.europa.eu/system/files/2021-04/20210429%20-%20EDF%20Factsheet.pdf.

[7] NATO, “NATO 2022 Strategic Concept”, NATO (June 2022), accessed 29 September 2025, https://www.nato.int/nato_static_fl2014/assets/pdf/2022/6/pdf/290622-strategic-concept.pdf

EU and NATO Initiatives on Procurement

Recognizing the problem, the EU and NATO have launched numerous cooperation initiatives in recent years. In the EU, the Coordinated Annual Review on Defence (CARD) regularly surveys national plans to find synergies, while the 2017 Permanent Structured Cooperation (PESCO) framework, coordinated joint projects The European Defence Fund (EDF, 2021–27) provides €8 billion to co-finance collaborative R&D and prototyping.[8]

A range of new EU initiatives now incentivise cooperation, from the European Defence Industry Reinforcement through Common Procurement Act (EDIRPA) to the European Defence Industry Programme (EDIP) Security Action for Europe (SAFE).[9] These aim to aggregate demand and deliver economies of scale, though reporting remains patchy. Only 12 of 27 member states provided collaborative procurement data in 2025.[10] The Commission’s Defence Industrial Strategy (EDIS) sets the goal that by 2030, 40% of new equipment be procured collaboratively, half sourced within Europe, supported by a proposed €1.5 billion EDIP budget.[11] Its “Readiness 2030” White Paper stresses that joint procurement improves efficiency, interchangeability and interoperability.[12]

NATO has likewise moved to boost Europe’s industrial base. At the June 2025 summit, leaders endorsed new capability targets alongside the 5% pledge.[13] A cornerstone is the updated Defence Production Action Plan lays out concrete steps to aggregate demand, protect supply chains, and improve munitions interoperability. In parallel, Initiatives such as the Defence Innovation Accelerator (DIANA) and an Industrial Capacity Pledge aim to fund R&D and expand production.

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[8] European Defence Agency, “European Defence Fund (EDF)”, *European Defence Agency* (web page), accessed 29 September 2025, https://eda.europa.eu/what-we-do/EU-defence-initiatives/european-defence-fund-(edf)

[9] European Defence Agency, “Defence Data 2024-2025”, ed. Robin Emmott, doi:10.2836/3936681, https://eda.europa.eu/docs/default-source/brochures/2025-eda_defencedata_web.pdf.

[10] European Defence Agency, “Defence Data 2024-2025”.

[11] European Commission and High Representative of the Union for Foreign Affairs and Security Policy, “Joint Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: A New European Defence Industrial Strategy: Achieving EU Readiness through a Responsive and Resilient European Defence Industry”, JOIN(2024) 10 final (Brussels, 5 March 2024), https://defence-industry-space.ec.europa.eu/edis-joint-communication_en.

[12] European Commission, “Introducing the White Paper for European Defence and the ReArm Europe Plan – Readiness 2030”, *European Commission* (web page), 12 March 2025, accessed 29 September 2025, https://defence-industry-space.ec.europa.eu/eu-defence-industry/white-paper-european-defence-readiness-2030_en

[13] NATO, “NATO Defence Ministers Agree New Capability Targets to Strengthen the Alliance”, *NATO* (news), 5 June 2025, accessed 29 September 2025, https://www.nato.int/cps/en/natohq/news_235900.htm?selectedLocale=en

As the German Defence Minister affirmed at the 2023 Munich Security Conference, "national defence equals collective defence" – a stronger Europe means a stronger NATO.[14]

While EU and NATO frameworks remain constrained by weak enforcement, national cases illustrate the divergent logics that reinforce Europe's procurement paradox. Poland exemplifies how urgent frontline imperatives drive fragmentation. In 2022, Warsaw signed a record $13.7 billion arms deal with South Korea — Seoul's largest ever export contract.[15] A second tranche of 180 K2 tanks followed in 2025, consolidating Poland as the key European client of Korea's defence industry.[16] By bypassing delayed European collaborative programs in favour of rapid off-the-shelf deliveries, Poland nearly doubled its military spending to nearly 5% of GDP. Poland's case epitomizes the procurement paradox: higher spending yields less collective capability when national urgency trumps European coordination.

By contrast, Germany's partnership with Ukraine demonstrates that bilateral cooperation can strengthen both solidarity and industrial capacity. Since 2023, Rheinmetall has launched ventures in Ukraine to maintain Leopard tanks, produce artillery shells, and assemble vehicles.[17] These initiatives support Kyiv while simultaneously expanding Europe's industrial base, demonstrating that bilateral cooperation can enhance both solidarity and deterrence capacity. Anchored within an EU or NATO framework, such models could provide a pathway to reconcile national interests with collective needs.

Together, these cases underscore the central dilemma: Europe's procurement remains fragmented not only because of institutional weaknesses, but also because national priorities diverge. Poland's unilateral urgency and Germany's bilateral innovation both reflect rational choices in context. Yet, without stronger EU/NATO mechanisms to harness them, they risk deepening inefficiencies rather than resolving them.

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[14] Amina Vieth, "Pistorius at Munich Security Conference: 'A Stronger Europe for a Stronger NATO'", *German Federal Ministry of Defence* (news),18 February 2023, accessed 29 September 2025, https://www.bmvg.de/en/news/pistorius-a-stronger-europe-for-a-stronger-nato-5586746

[15] Joyce Lee and Josh Smith, "Insight: Inside South Korea's Race to Become One of the World's Biggest Arms Dealers", *Reuters*, 29 May 2023, https://www.reuters.com/business/aerospace-defense/inside-south-koreas-race-become-one-worlds-biggest-arms-dealers-2023-05-29/

[16] Stuart Dee and Kiran Suman-Chauhan, "Missiles, Markets, and Mutual Interests: Poland and South Korea's Evolving Defence-Industrial Cooperation", *RAND*, 4 September 2025, https://www.rand.org/pubs/commentary/2025/09/missiles-markets-and-mutual-interests-poland-and-south.html

[17] Rheinmetall, "Opening of the Maintenance and Repair Centre in Ukraine with Political Support", *Rheinmetall* (press release), 11 June 2024, https://www.rheinmetall.com/en/media/news-watch/news/2024/06/2024-06-11-rheinmetall-ukrainian-defense-industry-repair-hub; Reuters, "Germany's Rheinmetall to Produce Shells at New Plant in Ukraine, Kyiv Says", *Reuters*, 11 September 2025, https://www.reuters.com/business/aerospace-defense/germanys-rheinmetall-produce-shells-new-plant-ukraine-kyiv-says-2025-09-11/

Why “Spending More” Isn’t Enough

Despite higher defence budgets and new instruments, Europe’s procurement problem persists. Many of the recent initiatives are long-term soft measures with no enforcement. CARD and PESCO offer frameworks for discussion but no binding rules. The EDF and EDIP contain only modest funding: even €1.5 billion over three years is dwarfed by the €88 billion that EU states spent on equipment procurement in 2024.[18] The aspirational targets likewise have no teeth: the EU’s 40% collaborative procurement goal is not legally mandated, echoing earlier unmet benchmarks.[19] In 2021, member states achieved only 18% collaboration.[20] Thus far, “cooperation remains the exception rather than the norm,” as the European Defence Agency starkly put it in 2022.[21]

Institutional and political barriers compound the issue. Defence remains a national prerogative, with governments shielding home industries and issuing custom contracts, or turning to the U.S. Foreign Military Sales program. Strategic culture reinforces this: when Ukraine needed tanks, Poland opted for South Korean models over a delayed Franco-German program.[22] Bureaucratic obstacles such as inconsistent certification rules further fragment markets, even in critical sectors like drones or cyber.[23]

In practice, most urgent purchases are still national, while EU initiatives focus on long-term R&D. The “good news” of higher spending is thus absorbed into existing national budgets rather than pooled for collective impact. Until Brussels can enforce real coordination, spending will remain fragmented. As one expert concludes, Europe’s challenge is not budget size but structural inefficiency – “not arbitrary spending targets, but building a more efficient, integrated defence system”.[24]

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[18] European Defence Agency, “EU Defence Spending Hits €343 bn in 2024, EDA Data Shows”, *European Defence Agency* (news), 2 September 2025, accessed 29 September 2025, https://eda.europa.eu/news-and-events/news/2025/09/02/eu-defence-spending-hits-343-bln-in-2024-eda-data-shows

[19] European Defence Agency, “Defence Data 2024–2025”.

[20] Koenig and Schütte, “Procurement Processes”.

[21] European Defence Agency, “EU Defence Review Calls for Greater European Cooperation to Match Defence Spending Increases”, *European Defence Agency* (news), 15 November 2022, accessed 29 September 2025, https://eda.europa.eu/news-and-events/news/2022/11/15/eu-defence-review-calls-for-greater-european-cooperation-to-match-defence-spending-increases

[22] “Poland Buys South Korean Tanks and Combat Planes,” *DW*, 23 July 2022, https://www.dw.com/en/poland-to-buy-south-korean-tanks-and-combat-planes/a-62571314

[23] European Commission and High Representative of the Union for Foreign Affairs and Security Policy, “European Defence Industrial Strategy”.

[24] Napolitano and Wagemans, “Europe’s Defence Crisis”.

Implications for NATO’s Deterrence

Conventional deterrence hinges on credible capability. Defence spending figures are not an end in themselves; NATO’s credibility depends on hard capabilities that Europe can reliably mobilize. Yet, Europe’s industrial undercapacity and slow outputs mean the burden of deterrence continues to fall on the United States. Even when major EU packages were pledged to Ukraine, over 80% of the actual equipment came from the US.[25] In a major conflict in Europe, NATO cannot credibly deter or defend without harmonised ammunition stocks, spare parts, and platforms supplied across the continent.

NATO’s itself links industrial unity to deterrence. The updated Defence Production Action Plan aims strengthen the Allied defence industry to maximize return on investment.[26] This recognition is welcome, but it underlines the problem: more money alone will not deter aggression if Europe cannot efficiently turn funds into cohesive military capacity.

In sum, Europe’s procurement paradox directly weakens NATO’s collective deterrent. An Alliance built on pooled deterrence needs interoperable armies that share ammunition, platforms and standards. Leaving fragmentation unchecked risks a conventional disadvantage even as defence budgets grow.

[25] Jean-Pierre Maulny, “The Impact of the War in Ukraine on the European Defence Market” *IRIS* (September 2023): https://www.iris-france.org/wp-content/uploads/2023/09/19_ProgEuropeIndusDef_JPMaulny.pdf
[26] NATO, “Updated Defence Production Action Plan”, *NATO* (official text), 13 February 2025 (last updated 24 June 2025), accessed September 30, 2025, https://www.nato.int/cps/fr/natohq/official_texts_236518.htm?selectedLocale=en

Policy Recommendations

To break the procurement paradox, EU and NATO policymakers must move beyond voluntary goals and adopt binding requirements. Five measures stand out:

1. **Enforce Minimum Collaborative Procurement:** The EU's 40% joint procurement target should be binding. Access to EU/NATO funds could be conditional on meeting quotas, with annual public reporting to "name and shame" laggards. States would earn access to shared benefits by pooling orders.
2. **Create a NATO–EU Joint Procurement Agency:** Existing bodies like OCCAR and the NSPA are limited. A new joint body could combine those functions with extra enhanced capacity. By negotiating from a larger base, it could secure lower prices and ensure interoperability.
3. **Implement an Interoperability Index:** NATO should score new procurements against Alliance-wide standards, awarding "interoperability credits." High-scoring projects would receive expedited funding; unique national systems would not. This would make interoperability a measurable benchmark rather than an aspiration.
4. **Focus Funding on Common Platforms and Strategic Reserves:** EU and NATO budgets should prioritize flagship programs, such as next-generation tanks, integrated air defense, shared drone fleets, and expand pooled stockpiles of ammunition and spare parts. Strategic reserves would reduce duplication and guarantee surge capacity in crises.
5. **Enforce Transparency and Accountability:** All EU-funded projects should publish data on cost-effectiveness and NATO compliance. An independent audit body could compare collaborative versus national projects, exposing inefficiencies and pressuring governments to choose better options.

Several of these ideas echo existing EU and NATO plans but remain voluntary. Making them binding would require political will and legal reform, but without such steps Europe risks perpetuating fragmented rearmament.

Conclusion

Europe stands at a security crossroads. On paper, the commitment to a 5%-of-GDP defence spend signals resolve. In practice, that money will count for little if it flows through national procurement processes only. Allies may come together in theory, but as long as equipment and production remain siloed, NATO’s conventional deterrent remains compromised. The evidence is clear: rising European defence budgets have so far not produced commensurate increases in deployable, interoperable capabilities. To correct this, policymakers must confront the procurement paradox head-on.

The need is urgent. Russia has demonstrated the deadly efficiency of massed, standardised armed forces. If Europe aims to deter future aggression, it must match not only in quantity of spending, but in the quality of coordination. The steps outlined above would make pooling a requirement, not an afterthought. They would transform collective defence from a slogan into a procurement reality. Without such reforms, Europe’s increasing defence expenditures may fail to translate into effective military capabilities, undermining NATO’s collective deterrence. Continuing independent national procurement risks suboptimal outcomes while simultaneously limiting the resources available for other public priorities. By contrast, closer NATO–EU coordination on procurement could enhance efficiency, reduce duplication, and strengthen Europe’s collective deterrent.

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