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Analysis of today
Assessment of tomorrow

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How much defence can Europe buy jointly?

The Council of the European Union approved five joint defence projects. They cover drones and systems to shoot them down, sea and submarine surveillance, military satellites, anti-aircraft and anti-missile defence, and protection of the Union's eastern border.

The approval opens the possibility for the projects to receive money from the European defence industry programme. It does not commit any country to purchase a specific radar, satellite or missile.

The members agreed on where the biggest gaps in European defence lie. The next steps will be more difficult, as each government must decide what to fund from its own budget, which equipment its military can use and how much control it is willing to cede to partners.

Without those decisions, armed forces will continue to use systems that make it difficult to share data and that rely on separate supply chains.

Twenty-six EU member states, together with Norway and Ukraine, participate in the drone programme.

Such a large number of participants makes it possible to place larger orders, but also increases the number of military requirements that must be coordinated.

One army needs a small reconnaissance drone, another a system to protect an airport and a third a tool that can operate in conditions of intense electronic jamming.

States do not have to buy the same drone. They must, however, agree how the various drones will send data to the military, which parts they can procure jointly and who will maintain them.

Large sums, different deadlines

The European Commission has earmarked €325 million from the defence industry programme for the launch of these projects.

When it proposed them in July, it also set out an ambition to provide around €190 billion for them by 2036.

The first amount is European funding intended for the establishment and initial implementation of the projects. The second depends on future investments and decisions by individual countries.

Even the estimates for individual projects do not cover the same period. In the document proposed by the Commission, investment in naval defence is estimated up to 2045, and investment in joint air defence up to 2040.

The EU wants to be better prepared for defence by 2030, when certain parts of the programme should already be in operation.

Estimates for individual projects cover a longer period than the investment announcement up to 2036; none of these amounts represents the approved budget for their full construction.

The Commission selected five of the nine proposals. The remaining four did not meet all the requirements, partly because their goals were not clearly described or sufficiently developed.

The selection shows that European status is not granted to every politically attractive plan.

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For all five approved projects, however, the documents set out broad objectives and investment estimates; data on specific orders and delivery dates will have to come from subsequent decisions.

States are already allocating sums for defence that far exceed the initial European support.

According to the European Defence Agency, EU members spent €418 billion on defence in 2025, including €115 billion on equipment

purchases.

Joint procurement accounted for 24 per cent of equipment spending. Budgets can continue to grow, yet European militaries still order different products for the same tasks.

More money alone does not answer the question of whether these products can work together.

The deal becomes sensitive when it comes to determining which factory gets the work, who maintains the equipment, and who provides the spare parts. The country paying for that equipment wants reliable delivery and the ability to use it when needed.

A manufacturer, on the other hand, needs to know how many units will be ordered before expanding a plant and hiring staff.

The European stimulus may facilitate preparations, but factories will only receive sufficient work when governments coordinate their needs and sign contracts.

The warning must arrive before the missile

Air defence best illustrates why it is not enough for each country to buy more weapons on its own.

A radar on the territory of one member may be the first to spot a missile heading towards another.

Its data must quickly reach the forces that can intercept it, in a format their systems can understand and that is reliable enough to justify the decision to use a weapon.

If the data arrive late or the two systems display the trajectory differently, an additional missile will not make up for the lost time.

The European project envisages connecting existing and future radars, interceptors and command systems.

Its participants already have different equipment and will not switch to a single type of radar or missile overnight.

Armed forces must agree what data the radars share, how it will be displayed to aircrews and who in each country authorises interception.

Joint exercises should demonstrate whether everything works quickly enough once a missile is on its way to its target. In the proposal, the Commission emphasised that the new system should be harmonised with NATO's requirements.

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Most EU members plan to use the same forces and equipment for defence within the Alliance, so a separate European way of working could create new difficulties. Compliance is checked through technical requirements, joint testing and crew training.

The satellite project will provide early detection of missile launches, secure communications and imagery to help armed forces monitor events on the ground.

Some countries already have their own satellite programmes, while others depend on data received from partners.

For joint procurement, it will be necessary to agree who pays for the systems, who is allowed to see sensitive data and how quickly information reaches the country that needs it.

The maritime exercise shows what is still missing

There is a useful starting point for a maritime project. On 23 September, the European Defence Agency announced that its MARSUR network had exchanged data with national command systems and NATO in real time during an exercise off Portugal.

Participants tested procedures for monitoring activities at sea and protecting underwater infrastructure.

The exercise showed that the existing connections enable rapid data exchange. The European Defence Agency now plans to upgrade MARSUR so that countries can securely send more classified military information over the same network.

For that work, it sought support from the new European defence project, but funding has not yet been decided.

> Defence ministers approved measures to strengthen the European Defence Agency

The outcome will be seen in which countries connect the improved systems and whether they regularly exchange data through them, rather than only checking the connection during exercises.

The European Defence Agency announced this month that an increasing number of earlier joint projects are moving closer to being procured or used by the military.

On 28 September, defence ministers approved measures to strengthen the Agency, including a centre that would help countries jointly buy equipment and services already available.

Its role would be particularly useful for projects where the armed forces have already agreed their requirements and now need to determine the quantities, prices and methods of purchase.

Equipment will not arrive at a uniform rate

The five projects are likely to progress at different speeds. Certain types of drones, and the equipment to shoot them down, can be purchased and tested in small batches, with adjustments based on soldiers' experience.

Parts of the maritime network have already undergone joint exercises. Linking national anti-missile systems and developing military satellite capabilities will require greater investment, more complex testing and additional data-access agreements.

Decisions yet to come will determine how much of growing military budgets governments will tie to joint contracts and whether they will commit to quantities that allow industry to plan production

Faster programmes could facilitate others if, through them, governments learn to define requirements jointly, order equipment together and test it collaboratively.

It is also possible for each country to participate in the European project while continuing to buy mainly according to its own deadlines and needs.

Decisions yet to come will determine how much of growing military budgets governments will tie to joint contracts and whether they will commit to quantities that allow industry to plan production.

It will be easiest for governments to request European funding for programmes they are already developing at home.

In doing so, they would safeguard jobs in domestic factories and postpone agreement on how they will share production with partners.

Before awarding funding, the Commission needs to see what specific work the states have agreed, who will do it and what the participating armed forces will receive.

If most of the funds go to existing national programmes, less will be available for new projects that require joint investment.