#112 - COMMENT

Armament Industry European Research Group

WHAT ARE THE MAIN DRIVERS OF MEMBER STATES' DEFENCE PROCUREMENT PRACTICES?

The British Case

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ABSTRACT

The drivers of UK procurement choices are multiple with different considerations appearing as prominent for different systems. The UK uses defence equipment choices. The UK expects defence procurement choices in the pursuit of multiple objectives.

The UK has had a core orientation towards defence competitive tendering from the international market since the late 1980s, and in government procurement in general this remains the core guidance. But defence has emerged as a special case given the diminution of IK defence suppliers in many sectors and UK governments' ambitions for operational independence on the use of their forces, the maintenance and development of national defence industrial capabilities, and economic benefit from defence spending. Collaborative development with like-minded partners continued to be a way to spread costs and risks with the Global Combat Air Programme being the biggest case. The UK has also used US suppliers for many equipment items, especially airborne assets, but this has likely peaked. The changes in US behaviour in since the beginning of 2025.

There is likely consensus among those that focus on defence in the UK that Europe largely defined needs to much increase its capacity to deter and defend itself with much less US help. But the nature of the nature of the US relationship is marked by uncertainty. This will have consequences for UK and European defence behaviour.

Keywords: Procurement | Collaboration | Competition | United States | Operational independence | Prosperity |Europe.

INTRODUCTION

British defence procurement is shaped by a series of conflicting forces whose relative weight varies from project to project. There is not a single factor that can be pointed to as inevitably very powerful.

In September 2024 the UK had a new Labour Government which took over from 14 years of Conservative-dominated administrations that had initially stressed a default procurement strategy of buying on a competitive bases from the international market.[1] However this was subsequently followed by several sector industrial strategies culminating in the Defence and Security Industrial Strategy of 2021.[2] In its last months the Conservative Government also issued an Integrated Procurement Model for defence which, among other things, placed further stress on the value of governmental partnering with industry and a stress on UK requirements that would help with defence exports.[3]

The Labour Government that took office in July 2025 committed to the generation of three documents: a Strategic Defence Review to spell out UK policy and force structures in the and light of the state of the world, a Defence Reform paper which would address the management of the overall defence machine, and a new Defence Industrial Strategy.

None of these had been published by the time the new administration arrived in Washington, in part because the defence needed clarity from the Treasury about the money it would have available. There was some clarification in the spring of 2025 when the Government committed to reaching 2.5% on defence by 2027 and to increasing the defence budget by over £2 billion in the 2025/6 financial year (which begins at the start of April). Then came the drastic changes in the US position from February 2025 which have massive implications for the UK and must imply modifications from what had previously been drafted.

In this situation of uncertainty, what can be said is that the Labour Party in opposition generally endorsed decisions of procurement projects and industrial commitments. Since coming to power, its leaders have confirmed some key points: these include continued support for Ukraine to the tune of £3 billion a year, a renewed 10-year agreement with MBDA for the development and production of complex weapons, a desire to work more closely with

[1] Ministry of Defence, *National Security Through Technology* (London, 2012), https://assets.publishing.service.gov.uk/media/5a75b74840f0b67f59fcf0ed/cm8278.pdf
[2] HM Government, *Defence and Security Strategy* (London, 2021), https://assets.publishing.service.gov.uk/media/60590e988fa8f545d879f0aa/Defence_and_Security_Industrial_Strategy_-_FINAL.pdf
[3] Ministry of Defence, *Integrated Procurement Model* (London, 2024), https://assets.publishing.service.gov.uk/media/65e07110cf7eb16adff57ff4/Integrated_Procurement_Model.pdf

individual European states and European bodies, continued commitment to the nuclear deterrent programme, more support for the AUKUS agreement on submarines and novel technologies, a six per cent pay rise for the UK military, confirmation of commitment to the GCAP programme with Japan, and renewal and enlargement of a long-term contract with BAE Systems for ammunition production, and emphasis on the potential of defence procurement spending to enhance UK prosperity.

This author does not expect major surprises in the Defence Industrial Strategy paper, Defence Reform thrusts towards a more integrated defence management structures and a notable weakening of single service powers have already been made clear [4], and the SDR is likely to have things to say about force structures. The indications about what it will say about the US are that officially the UK Government will continue to refer to the 'special relationship' and to the US as the UK's 'closest ally'. [5] [i]Whether political leaders and officials actually believe this is a different and more opaque matter. More and more of the UK public certainly do not. [6]

With this lengthy but necessary introduction, attention can be turned to the drivers of UK procurement choices, the focus of the paper.

COMPETITION

Any discussion of the drivers of UK defence procurement must begin with the fact that there is a cultural disposition among commercially-focused civil servants to see competition as the most reliable route to value, especially which is often conceived in terms of low price. The stress on competitive tendering was brought to prominence in UK defence in the 1980s and has not disappeared. It has been reinforced by the stress on various forms of competition in the EU-compliant Defence and Security Public Contracts Regulations (DSPCR) of 2011 which have only been slightly modified since.[7] Within government as a whole, the policy stance is

[4] Ministry of Defence, "Defence Secretary's Speech on Defence Reform". *GOV.UK*, 18 February 2025. https://www.gov.uk/government/speeches/defence-secretarys-speech-on-defence-reform--2

[5] Nina Lloyd, "Healey To Meet US Counterpart as European Leaders Hold Crisis Talks on Ukraine". *The Independent*, 6 mars 2025. https://www.independent.co.uk/news/uk/home-news/john-healey-emmanuel-macron-volodymyr-zelensky-ukraine-washington-b2709834.html

[6] Kate Nicholson, "Majority of Brits No Longer Think of Trump's America as an Ally, Poll Shows". *HuffPost UK*, 8 April 2025. https://www.huffingtonpost.co.uk/entry/poll-majority-of-brits-dont-consider-trumps-us-a-friend_uk_67f4bd22e4b042c1f77080b4

[7] Defence Equipment and Support, "The Defence and Security Public Contracts Regulations (DSPCR) 2011". GOV.UK, 27 February 2025. https://www.gov.uk/government/publications/the-european-union-defence-and-security-public-contracts-regulations-dspcr-2011

that 'effective competition and transparency are key enablers of the procurement objectives of delivering value for money and being seen to act with integrity.'[8]

A common bureaucratic preference for some form of competition also reflects the reality that this procurement strategy is less likely to be serious queried by approval by non-defence departments, not least the Treasury.

Drivers of Sole Source contracting

However this stress on competition is not reflected in practice, in part because it is not easily compatible with other policy lines. In 2023/4 less than 40% of contracts by value were awarded on a competitive basis.[9]

This figure is generated by three forces.

In some cases, the MoD wishes to maintain and develop a UK industrial capability (notably surface warship building, nuclear weapons and submarine building, complex weapons and combat air). In such fields, often only one company is qualified. Governmental emphasis on using UK defence industry has been increasing since at least 2015 when the MoD first got direction to make a contribution to the UK economy. A series of sector industrial strategies have since been published, some dealing explicitly with the defence sector, such as the Combat Air and Land Industrial Strategies, and others covering dual use areas (National Shipbuilding Strategy, Space Strategy, Artificial Intelligence) . Generally, when government policy is to use sole source machinery for development work, and perhaps for contracting as a whole, the MoD is looking to cooperative relationships with the private sector with 'partnering' being a common term rather than the adversarial characteristics of much competitive contracting with a government customer looking to get as much as possible for as little money as possible. But still, financial pressures on budgets and the past habits of MoD commercial staff can have impact.

Quite different is when the MoD wants to use or must use the American government-to-government *Foreign Military Sales* (FMS) system.

Lastly, reducing the opportunities for competitive tendering is the reality that, for many support contracts in particular, the MoD has little choice but to go to the original equipment contractor.

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[8] GOV.UK, "Guidance : Competitive Tendering Procedures (HTML) ", 14 January 2025. https://www.gov.uk/government/publications/procurement-act-2023-guidance-documents-define-phase/competitive-tendering-procedures-html

[9] GOV.UK, "MOD Trade, Industry and Contracts : 2024", 6 March 2025. https://www.gov.uk/government/statistics/mod-trade-industry-and-contracts-2024/mod-trade-industry-and-contracts-2024#MOD_expenditure_by_type_of_contract

Vendor Lock-In

The frequent need to go through an Original Equipment Manufacturer using a sole source contract is a growing concern in parts of the MoD if only because technology is moving so quickly that update possibilities are occurring more often. Also additive manufacturing is enabling parts to be produced in different locations. Including on board ships. Thus, there is a growing government interest in being able to introduce updates and replacement parts either by working with another contractor or even doing the work itself. [10] Because of the difficult matters if Intellectual Property transfer that will need to be addressed, this will not be easy area for change.

Using the FMS Route

However, sole sourcing has also been driven by a known preference for some types of equipment developed and produced in the US. When the UK either must or prefers to buy through the FMS system, formal competitions are not possible because the US Government does not compete in formal terms or even sign contracts. FMS deals are done through Government-to-Government agreements. The UK has been an extensive user of the FMS machinery, especially for large aircraft and some other flying systems: the *P8A* maritime surveillance aircraft, the *Wedgetail* airborne early warning aircraft, *Protector* UAVs, the *Rivet* Joint electronic intelligence aircraft and the *Apache E* helicopters were all bought without a formal competition through FMS.

However, the incremental impact of individual choices has led to increased awareness in and beyond government of the foreign exchange costs, operational constraints risks, and the very limited national economic benefit of defence imports.

The maintenance and development of national industrial capability

A contrasting source of preference for sole source contracting are policy commitments to maintain UK industrial capability for the development, production, support and update of what are seen as key military platforms and large systems. Such systems are correctly viewed as key to the commitment of successive UK Governments to enjoying operational independence regarding the use of its armed forces.

In the most important areas, the last fifty or more years have seen industrial consolidation drive a diminishing number of orders spread over a longer period of time, leaving only one

[10] Ministry of Defence, *Defence Advanced Manufacturing Strategy* (London, March 2025). https://assets.publishing.service.gov.uk/media/67e684a337baea91c58c9fd5/Defence_Advanced_Manufacturing_Strategy.pdf

surviving UK company. This is most conspicuous with regard to nuclear submarines. After a procurement gap after the completion of the last *Vanguard* class *Trident* submarine, the construction site at Barrow ran down its workforce. A significant, but costly, capability recovery was effected with the launch and execution of the *Astute* attack submarine and further strengthened as the *Dreadnought* programme began. Rolls Royce has built a capacity to develop the *PWR-1* reactor design that had come from the US under the Polaris programme and is producing the *PWR-3* for the *Dreadnought* boats. The submarine industrial enterprise can in 2023 look at a demanding drumbeat of orders through to the AUKUS-focused *Astute* successor. But it is under significant government and external pressure to perform.

While BAE Systems have responsibility for the development and build of submarines, Babcock International have the lead on their repair and upgrade which takes place in the south-west of England. In 2023-2024 Babcock received its latest contract, which is for the refurbishment of HMS Victorious, a *Dreadnought* submarine. Overseeing all this and in close contact with the companies and their activities is the Submarine Delivery Agency, an MoD body which is organisationally separate from the MoD's main procurement body, Defence Equipment and Support (DE&S).

The combat aircraft area is another which the Government sees as essential for industrial capability and here in 2018 it announced an MoD and RAF partnered arrangement with four companies to develop a successor to the *Typhoon*. Two of the firms were clearly British (BAE Systems and Rolls Royce) while the two others (Leonardo and MBDA) had ownership roots on the continent but strong technological and manufacturing strength in the UK. Today they are in the grouping with Japanese and Italian firms and their governments to deliver the *Global Combat Air Programme* (GCAP).

More specialised than GCAP is what was first (in 2005) called the Team Complex Weapons Programme. This linked the MoD with MBDA UK and its lead suppliers to maintain a British capability to develop and produce a range of complex weapons. This ambition is implemented through a long-term agreement (the Portfolio Management Agreement) which has flesh put on it with separate contracts for specific systems. Under this agreement, while MBDA does not produce all the missiles used by armed forces, it has a suite of anti-air, anti-ship and air to ground systems, several of which involve collaboration with other European countries. The incoming Labour Government agreed days after it took office to a ten-year extension to complex weapons. It signed a Portfolio Management Agreement worth at least £6.5 billion.[11]

[11] MBDA, "MBDA and UK MOD Renew Complex Weapons Partnership", 22 July 2024, https://www.mbda-systems.com/mbda-and-uk-mod-renew-complex-weapons-partnership

Finally, the UK uses sole source arrangements for the supply of basic ammunition. These involve BAE Systems since it was the purchaser in the late 1980s of the former state arsenals, the Royal Ordnance Factories. The first contract was signed in 2008 and ran until 2022, being succeeded by the signature in 2020 of the £2.4 billion *Next Generation Munitions Solution* which was to operate from 2022 until 2037. The long-term nature of these commitments is justified by the need to enable corporate investments in manufacturing facilities and recovery of the costs involved. The implications of the war in Ukraine then prompted the MoD fund the further expansion of some production capability with two further contracts.[12]

THE AVAILABILITY OF COLLABORATION

As the *Global Combat Air Programme* with Japan and Italy, and many of the weapons in the Complex Weapons Portfolio illustrate, the UK has been ready to improve its access to overseas technology, industrial skills, markets and finance by basing development and procurement on a collaborative basis with like-minded friendly states. A collaborative project which will still provide the UK with operational independence and the capacity to support and modify a system remains appealing. The choice to return to the *Boxer* programme in 2018 illustrated this. The UK had left the programme in 2003 but failed to procure an alternative system at its first attempt. In 2018 it could have opted to run another competition but instead chose to return to the programme which provided significant manufacturing work and gave the UK the capacity to sustain and modify the equipment. This arrangement must have been a factor in the decisions to establish a joint venture in the UK (under the name RBSL) bringing together Rheinmetall and BAE Systems' businesses. Moreover, the 2021 *AUKUS* agreement is a commitment to extending collaboration on nuclear submarines to the U.S. and Australia, although many obstacles will need to be overcome to put this into effect.[13]

In using collaboration, the UK has been fully engaged with using OCCAR as a management body, for instance its *A400M* and *Boxer* projects are run from there. It has long supported the idea that the principle of *juste retour* on individual projects was often a cause of delays, cost increases and the UK has provided a past OCCAR director as many other staff. The new Labour Government, which has put defence cooperation in a prominent place as part of its aim to

[12] BAE System, "UK Ministry of Defence raises frontline battlefield munitions order to £410m", 12 September 2023, https://www.baesystems.com/en/article/uk-ministry-of-defence-raises-frontline-battlefield-munitions-order-to-410m#:~:text=BAE%20Systems%20has%20secured%20an,%C2%A3280m%20to%20%C2%A3410m
[13] *GOV.UK*, "UK, US AND Australia Launch New Security Partnership", 15 September 2021. https://www.gov.uk/government/news/uk-us-and-australia-launch-new-security-partnership

improve relations with European states and the EU, will no doubt continue readiness to use OCCAR.

Although not tied to specific projects, the UK drive for closer relations with European states that could well involve collaborative work is reflected in the Trinity House agreement with Germany in 2024, the ongoing in 2025 efforts to revive the Lancaster House agreements with France, and the February 2025 defence cooperation agreement with Norway, all of which had defence industrial cooperation on their menu.

The UK has not been a major participant in multinational procurements, although it does use the NATO Support & Procurement Agency (NSPA) on a pragmatic basis, for instance for some support and modification of its *Multiple Rocket Launchers* systems.

OTHER DRIVERS

Additionally, the UK formal conception of value in defence procurement has widened in recent years so that it contains many more considerations that can either be become weighted assessment/evaluation criteria within formal competitions or lead to a sole source approach. Since 2015 the MoD has been directed to contribute to the UK 'prosperity' agenda and there is also a more elusive intent that defence should help with the levelling up of the UK in terms of the different levels of prosperity across regions of the UK. When there are both threat and opportunity pressures to increase defence spending, the positive impacts of defence in the wider economy are receiving increased attention both within Government and outside.

Linked to the economy, the MoD looks to defence to help with strengthening of the union: if well-paid and long-term jobs in defence can be located in Scotland, Northern Ireland and, less prominently Wales, it can be thought these regions will be more reluctant to secede from the UK. The JEDHub reports address not just spending levels in the country as a whole but also in specific regions.[14]

Successive UK governments including the present one have sought to boost innovation and value in defence by bringing more Small & Medium Enterprises into defence. In March 2025 the MoD announced the creation of an SME support hub within the MoD to assist new companies to enter the sector. [15] This is a complicated area which should take more account

[14] JED Hub, "JEDHub Annual Economic Report", May 2023, https://www.jedhub.org/report2023

[15] Vicky Maggiani, "Government Unveils Major Boost For Small Businesses In UK Defence Supply Chain", Defence Online, 11 March 2025, https://www.defenceonline.co.uk/2025/03/11/government-unveils-major-boost-forsmall-businesses-in-uk-defence-supply-

of the many SMEs that are already part of the supply chains of prime contractos and larger defence companies. Suffice it to say here that, despite the stress on the utility of SMEs, several aspects of government procurement practice make it hard for them and perhaps not enough attention is paid to the time and effort needed to integrate new technologies on to the platforms on which defence relies so heavily.

Policies about support for UK industry, collaboration, competition, and SMEs do not comprise the whole picture. Also important are the powers and the financial health of the branches of the armed forces which, since the Levene Reforms of 2012, have been responsible for the specification of requirements and the funding of equipment from their budget.

Difficult to measure or firmly demonstrate are the cultural attitudes of the different services and groups within them towards dependence on an external supplier for support and upgrades. Certainly those responsible for intelligence, surveillance and communication have embraced US systems in the form of the Rivet Joint electronic intelligence fleet, the maritime patrol P.8 aircraft, the Wedgetail successor to the E3A AWACs aircraft and the Reaper uncrewed weaponised surveillance drones.

Related to this is the importance attached by different military professionals to being able to operate effectively alongside U.S. forces. More tangible but less visible is the financial state of the individual service budgets, with the more-committed branches being eager to endorse the lower prices that are expected to come from an international competition.

How much change will follow from the Defence Reform plans noted above (which will reduce single service powers and give more much responsibility to the new National Armaments Director post) remains to be seen. The same is true of the consequences of the changes in the United States' positions.

Case study: the maritime sector and multiple drivers

Many of the factors mentioned so far are reflected in the maritime sector with different choices reflecting a number of procurement strategies since 2007. As the table below signals, some contracts reflected the prioritisation of UK industrial capability for warships and providing economic benefits in Scotland while others were driven by competition and the lower prices its was intended to generate.

chain/#:~:text=As%20part%20of%20the%20Defence%20Industrial%20Strategy%2C%20the,new%20spending%20targets%20to%20increase%20direct%20SME%20investment.

Table: Major UK naval contracts with their apparent driving considerations

Contract	Date	Type of procurement	Apparent drivers
Support activity / *Terms of Business Agreement (TOBA)*	2009	Sole source to two companies (BAE Systems, Babcock)[16]	▪ Ensure UK warship building capability ▪ Saveguard employment in Scotland
Build 4 Maritime Afloat Replenishment Ships (*MARS* tankers)	2013	International competition, awarded to Daewoo (Korea)	▪ Secure price and other benefits from competition (only final fitting out to be done in UK)
Build 3, then 5, offshore patrol vessels for RN[17]	2013	Sole Source with BAE Systems	▪ Maintain warship building capability ▪ Strengthen employment in Scotland (but end naval shipbuilding on south coast of UK)
Build 3 *Type 26* frigates	2017	Sole source with BAE Systems	▪ Maintain warship building capability ▪ Strengthen employment in Scotland ▪ To incentivise performance, order delayed for the second tranche of 5 ships
Develop and build 5 *Type 31* frigates	2019	Competitive tendering, awarded to Babcock	▪ Secure price and other benefits from competition accepting external (European) supply of a design and combat system) ▪ Enable the potential development of a second UK warship supplier ▪ Strengthen employment in Scotland
Build 2nd tranche of *Type 26* frigates[18]	2022	Sole source, awarded to BAE Systems	▪ Maintain UK warship building capability ▪ Strengthen employment in Scotland
Build 4 Fleet Solid Support (FSS) ships	2023	International competition, awarded to Navantia	▪ Secure price and other benefits from competition ▪ Strengthen the Union by bringing Harland and Wolf in Northern Ireland back into shipbuilding through a firm commitment that it would build the bow section and (perhaps) final assembly of the ships

Source: Author

[16] BAE System, *UK Naval Restructuring*, October 2013, https://www.baesystems.com/en-uk/article/uk-naval-sector-restructuring ; Terms of Business Agreement: https://assets.publishing.service.gov.uk/media/5a7901e340f0b679c0a07ce1/BAESystemsSurfaceShipsTermsofBusinessAgreementREDACTED.pdf
[17] BAE System, *UK Naval Restructuring*, October 2013, https://www.baesystems.com/en-uk/article/uk-naval-sector-restructuring
[18] Ministry of Defence. "British Shipyard Awarded £ 4.2 Billion to Build Royal Navy Ships", *GOV.UK*, 15 November 2022. https://www.gov.uk/government/news/british-shipyard-awarded-42-billion-to-build-royal-navy-ships

CONCLUSION

The trend since around 2010 has been for UK defence industrial capabilities linked to operational independence and economic benefits to become more prominent in the policy space[19] and to a certain extent in decision-making. The "Integrated Procurement Model" announced in the spring of 2024 signals that these considerations will not diminish.[20] It has an emphasis on close partnerships with industry, an avoidance of exquisite systems in favour of items that are exportable and capable of spiral development. This thought implies a smaller role for competition among UK and other companies for UK contracts and a bigger role of UK companies and the MoD working closer together to compete in the wider world. Making this change will not be easy as developments in naval procurement have shown. Significantly the *National Shipbuilding Strategy,* which owed much to its author from the business world, argued that the UK industry could be revitalised in part through competition.[21] The *Fleet Solid Support* (FSS) contract, which has been awarded to Navantia UK, Harland & Wolff and BMT, will be a major test of this proposition.

Given the changes in the US, a possible option for the UK would be to try to win favour in the White House by buying more US equipment. Whatever the wisdom of such a step, it would certainly require a British government to abandon efforts to use defence to support the UK economy and to abandon any image of the UK government enjoying operational independence regarding the use of its armed forces.

[19] The Defence and Security Industrial Strategy paper of 2021 was a capstone policy statement: HM Government, *Defence and Security Strategy* (London, 2021), https://assets.publishing.service.gov.uk/media/60590e988fa8f545d879f0aa/Defence_and_Security_Industrial_Strategy_-_FINAL.pdf

[20] GOV.UK, « Integrated Procurement Model : Driving Pace in the Delivery of Military Capability », February février 2024, https://www.gov.uk/government/publications/integrated-procurement-model-driving-pace-in-the-delivery-of-military-capability/integrated-procurement-model-driving-pace-in-the-delivery-of-military-capability

[21] National Shipbuilding Strategy, *CP605 - National Shipbuilding Strategy*(London, March 2022), https://assets.publishing.service.gov.uk/media/6231b9e2e90e070ed32f18ce/_CP_605___National_Shipbuilding_Strategy_Refresh.pdf

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The Armament Industry European Research Group (Ares Group) is a high-level network of security and defence specialists across Europe. Its aim is to provide a forum to the European armament community, bringing together top defence industrial policy specialists, to encourage fresh strategic thinking in the field, develop innovative policy proposals and conduct studies for public and private actors.