Armament Industry European Research Group

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

The Hungarian case

Dóra Hajling / Hungarian expert on defence

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ABOUT THE AUTHOR

Dóra Hajling / Hungarian expert on defence

Armament Industry European Research Group

The Armament Industry European Research Group (Ares Group) was created in 2016 by The French Institute for International and Strategic Affairs (IRIS), who coordinates the Group. The aim of the Ares Group, a high-level network of security and defence specialists across Europe, 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.

CONTACT

Jean-Pierre Maulny, Federico Santopinto, Louise Souverbie and Julia Tomasso
ares@iris-france.org
+33 (0)1 53 27 60 60

iris-france.org/ares
#ARESGroup

@AresGroup_EU

ARES Group - EU

INTRODUCTION

The disintegration of the Eastern Bloc and the fall of communism in Hungary in 1989 had a significant impact on the country's military industry. In the Soviet era, although strategic weapons were manufactured by the central power, the production of certain military equipment was delegated to Soviet member states so that they could meet their own and other countries' needs. This allowed Warsaw Pact members like Hungary to develop domestic military industrial capacities. However, the regime change and the reshaping political and economic landscape marked major transformations. With the end of Cold War, general demand for military equipment decreased and military production declined. Industrial capacities and previous markets were lost, while the size of the Hungarian army and military expenditure were drastically reduced due to the lack of resources. The military industry with its infrastructure and enterprises disintegrated, skilled workforce dispersed, and much-needed know-how almost completely disappeared. The absence of political will and adequate financial and budgetary resources prevented major development programmes from taking place in the following two decades to renew outdated armament and defence capabilities. Maintaining and extending warranty of depreciating technologies was not only expensive but also a short-term solution to the acute problem of outworn capabilities.

Although Western military equipment acquisitions began in the 1990s with the purchase of French Mistral short-range air defence missiles and then continued with the Gripen aircraft procurement, the process was given a strong boost by the Russian annexation of Crimea in 2014. This event has contributed to the revival of political will to allocate the necessary resources for the modernisation of defence forces. Hence, Hungary's commitment to increase military investment and develop its own army and defence industry have been strengthened. In addition, the gradually deteriorating international security environment has made the country realise that military equipment should increasingly be provided by its domestic industry, both for national security and economic reasons. The objective of the current paper is to highlight the reasons behind Hungary's defence procurement priorities and to attempt to explain its choice of arms suppliers. It will also list some of recent years' military procurements based on publicly available sources and data.

PROCUREMENT POLICY AND PRIORITIES

The direction of the Hungarian defence procurement policy of last years is revealed by the "Zrínyi 2026 Defence and Military Development Programme", the National Military Strategy and the Defence Industrial Strategy. The "Zrínyi 2026 Defence and Military Development Programme", adopted in 2016, is a comprehensive, initially ten-year-long military modernisation project aiming to renew the Hungarian Army and military infrastructure to guarantee the security of the country and meaningfully contribute to the strengthening of European and NATO defence. It also sets the target of increasing the country's military budget and allocating more of it to development,[1] with the overall goal to reach two per cent per capita military expenditure by 2024. The rearmament programme generated demand for military equipment and made Hungary attractive for investment for foreign arms manufacturers. In parallel, the government created favourable investment conditions (e.g., public funding for building manufacturing and R&D infrastructure), which further demonstrated its commitment to develop its domestic defence industry.[2]

Largely building on the guidelines of the Programme, a new National Military Strategy was passed in 2021. It placed a great emphasis on the development of national defence industrial capabilities which is considered essential for a well-equipped and modern army and can strengthen the European defence industrial base. Moreover, the Strategy set the ultimate goal of turning Hungary into a major defence industrial hub in its region.[3] In 2021, a Defence Industrial Strategy, a classified document, was also adopted. It defined the guidelines of defence industrial development thus determining the direction of the Hungarian defence procurement policy.

According to the Hungarian approach outlined in the above documents and programme, defence procurement and domestic defence industry development are closely linked. Cost and time efficiency, as well as the lack of a strong local defence industrial base has led the country to the decision to acquire market-available military equipment in the case of highly advanced systems. At the same time, arms suppliers are encouraged to establish production and R&D capacities in Hungary. Therefore, instead of continuing buying off-the-shelf and creating mere assembly plants, the country intends to launch domestic weapons

[1] Ministry of Defence, *Zrínyi 2026 Defence and Military Development Program* (2016), https://web.archive.org/web/20180306144605/https://honvedelem.hu/files/files/108409/zrinyi2026_190_190_7.pdf

[2] Taksás, B. (2024). *What future European Defence and Technological Industrial Basis (EDTIB) Do We Want/Need? The Hungarian Case. https://www.iris-france.org/what-future-european-defence-technological-and-industrial-base-edtib-do-we-want-need-the-hungarian-case/*

[3] *Hungary's National Military Strategy* (2021), https://njt.hu/jogszabaly/2021-1393-30-22

manufacturing and development, which contributes to technological and economic progress, and can enable Hungary to become an arms exporter in the future.

Several production plants have already been established through joint ventures involving shared ownership by the Hungarian state and foreign arms manufacturing companies, notably Rheinmetall and Airbus. These facilities ensure, for instance, the production of ammunition, explosives, combat vehicles, helicopter parts as well as radar and missile technology. Through joint ventures[4], Rheinmetall and Airbus provide technology and know-how, while the Hungarian State grants capital for infrastructure development. The system ensures that necessary expertise is available locally to develop domestic military industry so that it can meet the needs of the Hungarian defence forces, enhance R&D capacities and later enable the country to enter foreign markets with competitive export products. In addition to cooperation with its foreign partners, Hungary is striving to develop independent, national solutions for defence procurement. As we will see, defence equipment is mostly procured from EU partners, which also contributes to the strengthening of the European defence technological and industrial base. Nevertheless, the country obtains material from non-EU and non-European countries as well in order to enhance resilience and flexibility by diversifying its sources and avoiding overreliance on a limited number of suppliers or specific regions.

Alongside linking military equipment acquisition and modernisation to the development of local defence industrial capacities, Hungary also prefers to use its own procurement body (Defence Procurement Agency, Védelmi Beszerzési Ügynökség, VBÜ) for defence purchases. Defence procurement agencies generally follow an open defence procurement procedure (DPP), a long and complex process, involving competitive tendering. In addition, such procurements may also include certain industrial cooperation programmes – like the aforementioned creation of local production and R&D capacities to expand domestic weapons manufacturing and development, as will be discussed later in the case of Airbus - supporting the national defence industry and providing additional economic, technological and industrial benefits which go beyond simple equipment supply. These long-term industrial and technological collaboration programmes are of particular importance for Hungary seeking to boost its export and enhance its sovereignty and national security by developing independent manufacturing capacities and supply chain resilience.

Basically, Hungary has been a pragmatic supporter of common European defence initiatives like the European Defence Industry Reinforcement through Common Procurement Act

[4] Rheinmetall Hungary and Airbus Helicopters Hungary have been established in 2020, and Rheinmetall Hungary Munitions has been founded in 2022.

(EDIRPA), the Act in Support of Ammunition Production (ASAP) and the European Defence Industrial Programme (EDIP), as well as of the reinforcement of European defence industry and military capabilities. As such, the strengthening of the European Defence Technological and Industrial Base, including defence innovation and the enhancement of defence procurement cooperation between Member States was one of the priorities of the Hungarian Presidency of the Council of the European Union in the second half of 2024.[5] Although involvement remains limited, there are still some examples of Hungary participating in joint purchase of defence equipment. In 2022, the country joined the Euro Sky Shield Initiative[6], a German project for air defence within NATO framework, involving the acquisition and deployment of a German short-range system, a US-made medium-range system, and an Israeli long-range surface-to-air missile system. In 2023, Hungary was among 26 countries that signed the European Defence Agency's "Collaborative Procurement of Ammunition" project aiming to collectively procure ammunition.[7] In 2024, the European Commission approved funding for the France-initiated common procurement of Mistral very short-range air defence systems by nine EU Member States including Hungary under the EDIRPA financial support programme.[8] The project includes the acquisition of 1,500 MISTRAL 3 missiles over 4 years with the objective of reinforcing joint air defence and anti-missile capacities of participating countries.[9] Joint procurement can contribute to military capability development and complement national efforts. Hungary's limited participation in such joint tenders can, however, be explained by modest industrial and technological capabilities, which constrain possibilities. With the gradual enforcement of its own defence capabilities, the country may take a more active approach to joint procurement and EU-funded defence projects, as it is becoming an increasingly central issue within the European Union as well.

The Russian annexation of Crimea in 2014 has made a serious impact on Europe's security perception. This deterioration of the security landscape has certainly further fostered the intent to modernise its military and contributed to the launch of much-needed defence and military development reforms in Hungary through the Zrínyi Programme in 2016. As defence procurement and comprehensive capability development had been ongoing for years, the

[5] *Priorities of the Hungarian Presidency* (2024), https://wayback.archive-it.org/12090/20250412082227/https://hungarian-presidency.consilium.europa.eu/en/programme/priorities/

[6] *10 NATO Allies take further step to boost European air and missile defence capabilities* (2023), https://www.nato.int/cps/en/natohq/news_219119.htm

[7] European Defence Agency, *Collaborative Procurement of Ammunition* (2023), https://eda.europa.eu/docs/default-source/documents/press/q-and-a-pa-ammunition.pdf

[8] European Commission, *EU Defence Industry Reinforcement Through Common Procurement Act (EDIRPA)*, https://commission.europa.eu/strategy-and-policy/eu-budget/performance-and-reporting/programme-performance-statements/eu-defence-industry-reinforcement-through-common-procurement-act-edirpa_en

[9] *Mistral 3 project to receive €60 million from European Union* (2024), https://www.mbda-systems.com/mistral-3-project-receive-eu60-million-european-union

outbreak of war in Ukraine in 2022 has not caused any major change in its main directions or in procurement practices. However, the war has certainly had an impact on Hungarian military development and procurement plans, as new capability requirements (e.g., drones, air and missile defence systems) have arisen. Moreover, the war has drawn attention to shortcomings of Europe's military capabilities, and this has certainly further strengthened Hungary's commitment to increasing its own defence industrial capacities[10], which may also contribute to a stronger European defence industrial base. Despite policy differences with other EU Member States regarding the war in Ukraine, Hungary supports the reinforcement of the European defence industrial base as a strategic and long-term objective to enhance the EU's global position and economic/industrial competitiveness. The country acknowledges instruments such as the European Defence Projects of Common Interest[11] (EDPCI) established under the EDIP, which aims to strengthen the European defence industry. However, concerns have been raised that excessive emphasis may be placed on other objectives, potentially diverting focus and resources from the primary goal. The political debates therefore mainly stem from differing views on the means and pathways through which this common fundamental aim should be achieved.

In addition, Hungarian defence spending has been growing since 2014, ensuring an increase in financial resources for technology modernisation and defence industry development. Maintaining this trend has certainly been legitimised and strengthened by the war. With its defence budget in 2023, one year before its set target date, Hungary has met 2% GDP ratio expected by NATO. Moreover, following the European Commission's announcement of the ReArm Europe Plan/Readiness 2030[12] in March 2025, Hungary has been among 12 Member States initially requesting activation of the national escape clause under the Stability and Growth Pact. This clause provides Member States with additional budgetary space to increase defence spending while remaining within the EU fiscal rules, which shows Hungary's intention to boost its defence expenditure.[13] In addition, Budapest would use the Security Action for Europe (SAFE) instrument,[14] another pillar of the ReArm Europe Plan/Readiness 2030. The

[10] Csiki Varga, T. (2024). *Az orosz-ukrán háború hatása Magyarországra.* https://folyoirat.ludovika.hu/index.php/neb/article/view/7657/6221

[11] EDPCIs are collaborative industrial projects aimed at contributing to the development of Member States' military capabilities.

[12] A defence package providing financial levers to EU Member States to drive a surge in investment in defence capabilities.

[13] *12 Member States request activation of the national escape clause in a coordinated move to boost defence spending* (2025), https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1121

[14] The European Commission will raise up to €150 billion on the capital markets to help Member States increase investments in Europe's defence capabilities. These funds will be disbursed to interested States upon demand.

country may receive 16.2 billion euros of financial resources to develop national defence capabilities and support defence procurement and investments.[15]

PROCUREMENT PRACTICES AND ARMS SUPPLIERS

Strategic partners

With the Zrínyi 2026 Defence and Military Development Programme, a much-needed and intensive development of the Hungarian defence forces has begun, involving military procurement and enabling the achievement of several objectives. On the one hand, it has provided an opportunity to gradually replace existing, outdated Soviet military equipment with new, modern material, thus overcoming the country's significant disadvantage in military technology and allowing a deeper integration into alliance structures. On the other hand, it has become possible to deepen defence cooperation and bilateral relations with European and international partners, as well as to build domestic production and development capacities, which further strengthens the Hungarian army. Moreover, the development of local defence industrial capacities contributes to reducing excessive dependence on external partners and becoming more self-reliant in defence.

As far as defence industrial cooperation is concerned, Hungary's main partner is Germany and other, renowned European firms with strong market positions. Although, in the pursuit of diversifying relations, other, non-EU actors such as Turkey and Israel also play a significant role. As we will see in more detail hereinafter, enhanced procurement cooperation with the German-Turkish-Israeli trio is altogether justified by rational arguments such as favourable industrial cooperation opportunities and high technical standards of the suppliers' military equipment. It is important to stress, however, that political relations always influence defence procurement decisions which ultimately align with diplomatic connections and foreign policy priorities of the respective country.

Economic and trade relations between Hungary and Germany have traditionally been intensive and dynamic, which provides a solid foundation for defence industrial partnership. Germany not only figures amongst the largest foreign investors in Hungary,[16] but it is also one of the main export markets for Hungarian civilian products,[17] which makes the two countries'

[15] *Communication to the College on the notification to requesting Member States of the allocation of the loan amounts pursuant to Council Regulation 2025/1106* (2025), https://defence-industry-space.ec.europa.eu/document/download/704924ae-3aa2-4bd3-9675-e9cf1e5dfb96_en?filename=communication-to-the-college.pdf

[16] ITL Group, *German and Austrian foreign direct investment in Hungary* (2021), https://itlgroup.hu/german-and-austrian-fdi-in-hungary/

[17] Central Statistics Agency, *Hungary's main partners in foreign trade* (2024), https://www.ksh.hu/stadat_files/kkr/hu/kkr0024.html

relationship of strategic importance. However, other factors also explain why Budapest figured among the largest clients of the German defence industry between 2017 and 2021.[18]

The German military industry is known for its high quality, combat-proven material and positive export figures, which all increase confidence. Not surprisingly, with an advanced automotive industry considered a pillar of its economy, Germany is also at the forefront of armoured vehicle production.[19] Germany's excellence in manufacturing a wide range of armoured vehicles was certainly an important factor for the Hungarian army wishing to replace its Soviet armoured vehicles in order to modernise and enforce its ground forces. Perhaps not surprisingly, the automotive sector has long played a significant role in the industrial cooperation of the two countries (e.g., Audi, Mercedes, Opel and BMW production plants established in Hungary), making it a logical move to expand their partnership to the defence industry by building on solid manufacturing foundations. Considering more restrictive German arms export policies, cooperation with Hungary offers opportunities for German companies as well.

Hungary purchased a wide range of German-made equipment such as Leopard 2 main battle tank developed by KNDS Deutschland (formerly KMW), Lynx armoured fighting vehicle developed by Rheinmetall, and Panzerhaubitze 2000 (PzH 2000) armoured howitzer developed by KNDS Deutschland and Rheinmetall. An important element of the Hungarian military fleet is the Gidrán armoured combat vehicle originally developed by Turkish Nurol Makina, which will be further improved by a joint venture founded by a Hungarian firm, a licensee of Nurol Makina, and Rheinmetall Hungary.

Several reasons explain Hungarian military equipment procurement from NATO-ally Turkey. On the one hand, Ankara has significantly developed its military industry over the past two decades, transforming it from an import-dependent sector into an export-oriented one, which has made Turkey an important player in the global defence industry. It can now produce a wide range of military equipment, such as armoured combat vehicles, missile systems and modern drones – capabilities of paramount importance for the Hungarian military. Cooperation with the Turks may have also been encouraged by Ankara's openness to contributing to the Hungarian military development programme as a supplier. In addition,

[18] Hungary Today, *Hungary tops list of German weapons sales since 2017* (2021), https://hungarytoday.hu/hungary-tops-list-german-weapon-sales-military-army-arms/

[19] While the German vehicle industry has been living hard times due to high energy prices and Chinese concurrence, a part of its capacities is expected to be gradually converted to serve the armament industry to further develop armored vehicle production. An advanced automobile sector provides quite strong foundations for the defence industry through its production capacities, skilled workers, infrastructure and established supply chains. The increase of the German defence budget further encourages this process.

manufacturing of the aforementioned Gidrán armoured combat vehicles will also be undertaken locally, under a license granted by the Turkish partner Nurol Makina. Strong political and economic ties between the two states provided further impetus for defence procurement and closer cooperation in the defence sector. As NATO members, the two countries' defence partnership is based on solid foundations and fits into their intention to intensify bilateral relations.

As far as Israel is concerned, strong demand in the global market for Israeli defence products can be a convincing argument for buyers. The country's expertise in various advanced technologies, such as drones and missile systems, makes it an important supplier. Enduring bilateral political relations, as well as Israeli equipment's' efficiency and reliability may well have been important reasons for Hungary choosing the country as one of its main defence industrial partners not only for procurement but also for developing industrial cooperation. As far as acquisition is concerned, Hungary ordered military equipment such as Skylark I and 3 UAVs developed by Elbit Systems, Spike anti-tank guided missile developed by Rafael Advanced Defence Systems, and ELM-2084 radars developed by ELTA.

In addition to main partners, military equipment from Brazil, the United Arab Emirates and the US was also procured. However, compared to defence forces of other Central European countries, the Hungarian army has less American defence equipment. One possible reason for this might be that establishing defence industrial cooperation programmes with European partners may be less challenging and could make the potential export of locally manufactured equipment a realistic prospect. Such a cooperation framework might be more complex to implement with the United States — not to mention challenges associated with exporting defence-related items containing US components, which is subject to strict provisions of the ITAR regulation.[20] [21]

Key European Union partners

In terms of Hungarian military equipment procurement implemented until now, cooperation with European partners prevails. Budapest has a long-standing relationship with Swedish Saab, having first signed a JAS 39 Gripen aircraft lease agreement in 2001 to purchase the Gripen A/B standard version. Replacement of obsolete Soviet fighter aircraft, an issue that had already been raised during the Yugoslav War, was becoming increasingly necessary and urgent

[20] The US ITAR regulation keeps re-export of American defence and military technologies primarily under American control.
[21] Following a US-Hungarian summit held in Washington in November 2025, it was announced that Hungary would purchase additional US weapons. The specific systems have not yet been disclosed.

back then. Finally, in the second half of the 2000s, the leasing of 14 Swedish Gripen aircrafts was implemented as part of a larger compensation package. According to reports of a person involved in the transaction on the seller's side at the time, leasing was an obvious solution as Hungary would have had financial difficulties purchasing aircrafts following the communist era. Although procurement of American F-16s was also seriously considered, Gripen was more cost-effective, the option of leasing was provided by the seller, and it is a European military equipment, symbolising Hungary's aspiration to become a member of the European community.[22] According to the agreements, ownership of the aircrafts will be handed over to the Hungarian Armed Forces after the leasing period expires in 2026. In 2024, another agreement was reached to expand the Hungarian fighter fleet with 4 more Gripen C aircrafts showing that cooperation between the two sides is still ongoing. Extensive partnership with Swedish SAAB also includes procurement of Carl Gustaf recoilless rifles, the recent inauguration of the company's new Budapest office and the establishment of an Air Capability Development Centre, scheduled to open by the end of 2025 in Budapest, which will ensure Hungary's participation in joint development and innovation of modern fighter aircrafts.

In addition to Sweden, cooperation with France in terms of air capabilities and air force equipment is particularly important, which is not surprising considering the advanced French aerospace industry. In the framework of a long-standing and stable military cooperation between the two countries, Hungary purchased Airbus light utility/multirole military helicopters as well as transport military helicopters. A joint venture with Airbus was also created to establish a plant for helicopter component production which will not only supply Airbus but also support the Hungarian aviation industry. Production has already started and the range of Airbus components manufactured in Hungary may expand in the future. Their partnership is crucial in terms of air defence systems, as showed by the intention of nine EU Member States[23] to procure French-made surface-to-air Mistral missiles with EU co-funding under the EDIRPA financial support programme. This is a notable example of European defence cooperation and joint procurement enforcing the European defence industrial base. The French-Hungarian defence cooperation fits into a more comprehensive partnership, as the two countries share a common position on some strategic issues affecting Europe, such as the EU's strategic autonomy.

With regard to procurement for ground forces, the most important EU partners include countries such as the Czech Republic, Austria, and the aforementioned Sweden. Hungary

[22] Gergely, Zs. (2013). *"Én találtamki a lízinget"*. https://magyarnarancs.hu/belpol/pouilly-gripen-en-talaltam-ki-a-lizinget-interju-83142

[23] Belgium, Cyprus, Denmark, Estonia, France, Hungary, Romania, Slovenia, Spain.

procured Glock 17 pistols and M12 mortars from Austria and in 2019, the Hungarian State purchased British-Austrian owned Hirtenberger Defence Systems producing the above equipment. According to a technology transfer agreement concluded with the Czech armament manufacturer CZ (Ceskazbrojovka, Colt CZ), CZ P-07 and P-09 pistols, Scorpion EVO3 submachine guns and CZ Bren 2 assault rifles are now manufactured in Hungary under Czech license to equip the Hungarian Armed Forces. In addition, Aero Vodochody, the largest Czech aircraft manufacturer from which Budapest also procured aircrafts, became majority-owned by a Hungarian company.

CONCLUSION

Defence equipment acquisition is preceded by a complex decision-making process with several aspects to be taken into consideration. Available resources must be aligned with a country's need to have the broadest possible spectrum of defence industrial products and military capabilities. The final decision is largely influenced by political, economic, military and industrial motives. In the case of Hungary, limited financial resources and the urgent need to replace obsolete Soviet military equipment were most likely determining factors. Due to the country's integration into Western military structures and the emergence of new security challenges, military modernisation was inevitable.

Apart from equipment price and technical parameters, as well as military capabilities to be developed, Hungary had to also take into account the extent to which the acquisition could contribute to supporting local industry. Significant consideration may have been given to manufacturers producing high-tech equipment and also willing to participate in local defence industrial cooperation programmes thus contributing to the increase of foreign capital investment and Hungarian export, as well as to the stimulation of its domestic economy.

Political relations and strategic aspects are also determining factors as cooperation with a foreign partner should finally fit into a country's foreign policy priorities. In addition to collaboration with EU partners, Hungary is also seeking to diversify its international relations and open up to non-EU partners in defence. It is in line with the country's foreign policy strategy and contributes to the aim of reducing dependencies and increasing its sovereignty. A stronger Hungarian defence industrial ecosystem can reinforce the European Defence Technological and Industrial Base by ensuring additional capacities. Providing the military industry with a greater role in national economy can reduce vulnerability resulting from dependence on external military suppliers, equipment, technology and expertise, which seriously affects a country's ability to assert its foreign policy interests. The ultimate goal is to

procure, produce and develop advanced military equipment that would significantly contribute to the modernisation of the army and its adaptation to the emerging security challenges of the coming decades.

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The Armament Industry European Research Group

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2 bis, rue Mercœur - 75011 PARIS / France

+ 33 (0) 1 53 27 60 60

ares@iris-france.org

iris-france.org/ares

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