



PROGRAMME
EUROPE,
EUROPEAN UNION,
NATO

EU AND NATO DEFENCE INDUSTRIAL AND PROCUREMENT POLICIES: COMPLEMENTARITY OR COMPETITION?

Federico Santopinto / Senior Research Fellow at IRIS,
Head of the Europe, EU, NATO Programme on EU/NATO issues

September 2026



ABOUT THE AUTHORS



Federico Santopinto / Senior Research Fellow at IRIS,
Head of the Europe, EU, NATO Programme on EU/NATO issues

Federico Santopinto is Senior Research Fellow at the French Institute for International and Strategic Affairs (IRIS) in Paris, responsible for the Europe, EU, NATO Programme on EU/NATO issues.

He specialises in European integration in the areas of defence and foreign policy, as well as transatlantic relations and NATO. Federico Santopinto has also worked on military and security cooperation between the European Union (EU) and Africa.



PROGRAMME
**EUROPE,
EUROPEAN UNION,
NATO**

The Europe, EU, NATO Programme aims to analyse the political, economic and strategic changes taking place on the European continent and to decipher the respective roles of the European Union and NATO in global geopolitical affairs. It draws on studies and consultancy reports, video and audio clips, small-scale seminars, public conferences, and continuing and initial training courses. This programme is co-headed by Federico Santopinto, Senior Research Fellow at IRIS, and Louise Souverbie, Research Fellow at IRIS.

iris-france.org



@InstitutIRIS



@InstitutIRIS



institut_iris



IRIS



IRIS - Institut de relations internationales et stratégiques

ABSTRACT

Over the past decade, the European Union (EU) has significantly expanded its role in the defence industry. More recently, it has also developed a range of new and equally important instruments in the field of military procurement. The EU therefore appears poised to become a fully fledged actor in two major strategic areas: defence industrial policy and armament policies.

This notes examines how these new competences interact with — and potentially conflict with — those of North Atlantic Treaty Organization (NATO), at a time when the Atlantic Alliance is undergoing a profound transformation under the Trump administration. The analysis is organised around three main themes.

The first is to determine what the United States actually intends for NATO and its European allies: complete disengagement, a controlled delegation of responsibilities, or a new form of strategic supervision?

This note then considers the implications of this realignment for EU–NATO relations in the defence-industrial and military procurement fields, focusing in particular on the Union’s ability to strengthen the strategic autonomy of its Member States.

Finally, it addresses the challenges of planning and governance at European level. More specifically, it seeks to answer the following question: **What role should NATO play in identifying the priorities that should guide the EU’s defence and armament policies?**

INTRODUCTION

Throughout its history, the Atlantic Alliance has sometimes been portrayed as an instrument of American dominance over Europe. NATO has undoubtedly enabled the United States to maintain a lasting military presence on the continent, to exert considerable influence over European strategic choices, and to encourage the standardisation of equipment and doctrines in ways that have often benefited the US defence industry. Yet reducing the Alliance to a mere instrument of domination would be analytically misleading. It would also fail to capture the true nature of the transatlantic relationship.

For decades, the United States has been able to distinguish between the “exercise of leadership” and the “concept of domination”, at least in its relations with Europe. This distinction, which others in Europe have historically found more difficult to grasp (such as Russia, but also France and Germany in the past), is essential to understanding NATO’s role. The Alliance has indeed been one of the main instruments of American leadership in Europe. However, it has never been a mere mechanism of subjugation ... at least until now.

The reason for this is simple: the Europeans themselves, more than anyone else, wanted to keep the United States on their continent in order to guarantee their security. After the Cold War, they even came to desire this presence even more ardently than Washington did. A concept was thus coined to illustrate this dynamic: that of “empire by invitation”¹. The United States consolidated its influence over European military structures and, in return, Europeans benefited from the protection of the world’s leading military power, whilst retaining their freedom and political autonomy.

Today, the changes introduced by the Trump administration into the transatlantic relationship risk upsetting this balance. NATO appears set to undergo a fundamental transformation. Could it become an instrument of American control without the United States continuing, in return, to guarantee Europe’s security? What, then, would remain of the credibility of Article 5 of the North Atlantic Treaty, the very cornerstone of the Alliance? Is Washington still capable of distinguishing leadership from domination?

Answering these questions has become essential at a time when the European Union is striving to establish a new industrial defence policy to promote its strategic autonomy. This is all the more so given that, amongst the instruments created by the Union to support defence

¹ Geir Lundestad, “Empire by Invitation? The United States and Western Europe, 1945–1952”, *Journal of Peace Research*, Vol. 23, No. 3 (September 1986):263–277.

efforts, the mechanisms designed to encourage joint procurement are among the most significant and best-funded².

However, these instruments are inevitably set to interact with those of NATO. The Alliance, in fact, also has tools designed to facilitate military procurement, notably through the NATO Support and Procurement Agency (NSPA) and the NATO Communications and Information Agency (NCIA), as well as through several other initiatives that have emerged recently, including at the Ankara summit in July 2026 (see Annex I). But what is of greatest interest to us here is undoubtedly the role played in this context by the NATO Defence Planning Process (NDPP). The NDPP defines, for each Ally, the military capabilities it must make available to the Alliance to enable it to fulfil its mandate. In doing so, it contributes directly to guiding the procurement decisions of member states, including those to be developed within the framework of the EU. Consequently, several questions arise:

- How are the EU and NATO expected to cooperate in future on industrial policy and procurement? What forms of complementarity – and, where applicable, rivalry – might emerge?
- Above all, how can the requirement to ensure cooperation and complementarity between these two organisations be reconciled with the need to strengthen European strategic autonomy, which has become so pressing in recent years?
- And furthermore: What role should NATO play in defining the EU's industrial and defence procurement priorities?

At this stage, the division of responsibilities between the EU and NATO in the fields of defence industrial policy and procurement has yet to be clearly defined. NATO Secretary General Mark Rutte, however, has set out a clear view on the matter. During a hearing before the European Parliament in late January 2026, he argued that the EU should provide financial support to industry, while NATO should determine requirements, standards and priorities³. In other words, the Alliance should decide, and the Union should pay.

Mark Rutte has also called for EU programmes supporting the defence industry and joint procurement to be opened to entities from NATO member countries. The NATO Secretary General has even coined a new concept in this context: “NATO preference”, or “Made in

² The EU's Security Action for Europe (SAFE) programme alone provides for €150 billion in loans for this purpose.

³ Mark Rutte “Remarks by NATO Secretary General Mark Rutte at the Meeting of the European Parliament's Committee on Foreign Affairs (AFET) and Committee on Security and Defence (SEDE) in Brussels” (speech, Brussels, January 26, 2026), NATO

NATO". This stands in contrast to the notion of "European preference", or "Made in Europe", which remains the subject of intense debate within the EU⁴.

The conclusions of the NATO Summit held in Ankara on 7 and 8 July 2026 appear to reflect the approach advocated by Rutte. On that occasion, the Allied Heads of State and Government committed themselves to "eliminate defence trade barriers among Allies and leverage NATO's partnerships to maximise defence industrial depth and cooperation"⁵. One question nevertheless remains unresolved: what place is left for European strategic autonomy, which must inevitably be defined in relation to NATO's most powerful member, the United States?

ANATOMY OF TRUMP'S VISION FOR NATO — AND THE EU

To answer the questions raised, it is first necessary to understand to what extent NATO might change in nature and what the consequences would be for Europeans. This requires, first and foremost, a clear understanding of US intentions. What exactly do the United States want to make of the Atlantic Alliance? And what place does the European Union occupy, in their view, within this new framework?

Despite the erratic nature of Donald Trump's foreign policy, the strategic documents adopted by his administration between 2025 and 2026 convey messages to the Old Continent that could hardly be clearer or more direct. More specifically, there are two. First, Europeans must "Europeanise NATO"⁶. Second, they must set the EU aside⁷. These two injunctions are closely intertwined and should not be analysed separately.

By referring to the notion of the "Europeanisation of NATO", the White House certainly wants Europeans to relearn how to assume greater responsibility for their own defence, but it also intends this evolution to take place within the framework of the Alliance. And if Europeans are being called upon to invest more heavily in NATO, it is precisely because the United States has no intention of abandoning it, despite its desire to distance itself from the Alliance. Strategically, NATO remains far too important to Washington. It is much more than a mechanism of military solidarity: it is also an instrument for projecting American power across

⁴ Laura Kayali, Victor Jack et Chris Lunday, "Rutte's 'Made in NATO' weapons push collides with EU's 'Buy European' drive", Politico, 7 July 2026.

⁵ NATO, Point 2 of the [Ankara Summit Declaration](#), 8 July 2026.

⁶ This term is used and elaborated upon in the [National Defence Strategy of the United States of America](#) adopted in January 2026.

⁷ See in this regard the [National Security Strategy of the United States of America](#) adopted in November 2025: in this document, the United States mentions the EU solely to denigrate and delegitimise it, whereas the National Defence Strategy of January 2026 systematically ignores it.

the world, particularly in the Middle East. It structures military cooperation around a clearly defined hierarchy, with the United States at its apex, while generating considerable benefits for the American defence industry. For Washington, therefore, there is no question of packing up and relinquishing the advantages that NATO provides. On the contrary, the United States intends to continue overseeing the Alliance according to a principle that may be summed up as “leading from behind”.

It is worth examining the Trump administration’s official terminology on this point. The *National Defence Strategy*, published in January 2026, states that Europeans “will take the lead against threats that are less severe for us but more so for them, with critical but more limited support from the United States”⁸. This formulation — according to which American support will be more limited, yet must remain critical — appears nine times throughout the document. It suggests that Washington intends to continue providing the Alliance with certain essential military and command capabilities on which its effective functioning depends.

In other words, **Washington seeks to shift from being an actor to serving as an enabler, while preserving its hegemonic position**. Yet that hegemony may increasingly resemble domination rather than leadership.

In this scenario, the EU clearly has no place. In the *National Security Strategy* adopted in November 2025, the Trump administration publicly denigrates and delegitimises the Union⁹. It can therefore be inferred that Washington does not wish the rearmament of the Old Continent to take place within the framework of the European integration process, which aims at strategic autonomy. The EU is being called upon to take a back seat, or even to disappear from the equation altogether. In recent years, indeed, it has had the audacity to outline an interventionist and protectionist industrial policy capable of competing with American companies in the military and dual-use sectors. By launching a frontal attack on the EU whilst, at the same time, calling for NATO to be ‘Europeanised’, Washington is seeking to halt this momentum, even as its security commitments to Europe weaken.

The United States cannot, however, ignore the growing importance of defence industrial policies pursued at EU level. On the contrary, it is monitoring them very closely. Unable to prevent their development, US officials are seeking to influence them through particularly active lobbying, to which Mark Rutte’s stance is no stranger.

⁸ US Department of War, *National Defence Strategy of the United States of America* (Washington: January 2026): 4

⁹ US White House, *National Security Strategy of the United States of America* (Washington: November 2025).

In short, as mentioned in the introduction to this note, the United States and NATO wish for the EU's defence industrial policies to be based on three principles:

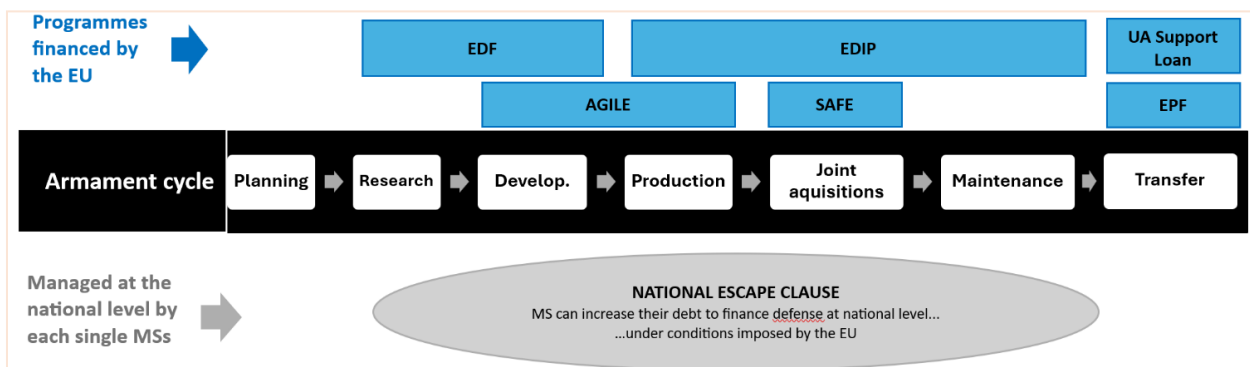
- That they be open to companies from NATO countries that are not EU members¹⁰,
- That they follow the priorities set by NATO¹¹ and
- That they avoid duplication deemed unnecessary¹².

However, these three elements touch precisely on the very foundations of any ambition for strategic independence that the EU is supposed to be pursuing.

THE EU'S COMPETENCES AND THE MISSING PIECE OF THE JIGSAW

In pursuit of its strategic autonomy, the European Union has, in recent years, established instruments capable of supporting every stage of the armaments cycle: from research at the lowest levels of technological maturity to joint procurement, including development, production, supply-chain security and maintenance.

EU funding programmes to support the defence cycle



¹⁰ NATO Heads of State and Government, "Vilnius Summit Communiqué", 11 July 2023.

¹¹ See, for example, "Deputy Secretary General: stepping up NATO-EU cooperation is essential", statement of 22 January 2025.

¹² As recently as 2026, during a public online consultation on defence procurement launched by the European Commission, the US Department of State and the US Department of Defence submitted a joint contribution criticising European policies deemed "protectionist and exclusionary". According to the US authorities, these policies represent 'the wrong course of action' and would undermine NATO's interoperability and preparedness. See: U.S. Departments of State and War, « Contribution to the EU Initiative 'Defence - Simplifying EU Rules for Defence and Sensitive Security Procurement » 13 February 2026.

It is in the field of procurement, however, that the EU's growing role has been most striking. Until only a few years ago, Europeans considered that the Treaties prevented them from using the Union's general budget to co-finance weapons purchases by the Member States. The war in Ukraine has clearly prompted them to revise that interpretation.

Since 2023, the Union has introduced both financial incentives, through European Defence Industry Programme (EDIP) and SAFE, and administrative measures, notably under EDIP, to encourage its members to procure military systems jointly. It is also preparing to revise Directive 2009/81/EC on defence procurement, with the aim, among other things, of introducing procedural incentives to facilitate the acquisition of EU-made equipment.

However, one fundamental piece is still missing from the armaments architecture that the European Union has painstakingly assembled in recent years. Strategic autonomy cannot be achieved overnight: it must be planned over the long term. Yet the Union still lacks a genuinely effective mechanism for bringing together, within a coherent framework and on the basis of a shared strategic vision, the many defence-industrial instruments it has established across the different stages of the armaments cycle. It does not have a place to do this.

Some coordination tools already exist at EU level, notably *Coordinated Annual Review on Defence* (CARD) and *Capability Development Plan* (CDP). These mechanisms, nevertheless, have been entrusted to the European Defence Agency and are primarily intended to coordinate the activities of the Member States, rather than directly steer the Commission's funding instruments, even though the Commission is expected to draw on their findings. More importantly, unlike the capability targets defined under NATO's NDPP, they do not assign specific tasks to individual Member States. Their main purpose is to provide an overview of European capabilities and identify the most significant shortfalls.

The lack of coherence in the EU's defence-industrial and procurement policies therefore remains particularly striking. As illustrated in the table below, each EU funding programme is based on its own procedures and underlying logic, as though the different pieces of the puzzle had been designed without a genuinely shared strategic blueprint to bring them together in a coherent manner.

How are projects to be funded by the EU identified?

- **Calls for proposals** – Most projects funded by the European Defence Fund (EDF), Programme for Agile and Rapid Defence Innovation (AGILE) and EDIP (including joint acquisitions) are identified, with a few exceptions, through separate calls for proposals specific to each programme.
- **A political decision** – The EDIP programme, however, also provides for the co-financing of the development, production and/or acquisition of particularly significant projects, known as European Defence- -Programmes of Common Interest (EDPCI)¹³. EDPCIs are identified by the Union at a political level rather than through calls for proposals. The Council must adopt implementing acts identifying these projects, setting out their objectives, the participating States and their estimated financial scope, all on the basis of a prior proposal from the Commission, in accordance with the standard Community method¹⁴. The EDIP Work Programme allocates €340 million for this purpose¹⁵.
- **Negotiations between the EU and Member States** – The identification of projects supported through loans under the SAFE programme, meanwhile, is based on yet another procedure: it relies on bilateral or mini-lateral negotiations between the European Commission and those Member States wishing to benefit from an EU loan. Key point: these negotiations take place in secrecy, with Member States unaware of the content of the agreements that other EU countries have concluded with the Commission. The Escape Clause, on the other hand, is granted by the Council, on the recommendation of the Commission and at the request of the Member State concerned. As in the case of SAFE, the political conditionality imposed by the EU on Member States wishing to activate this clause has proved to be very limited. In fact, the Escape Clause allows Member States that activate it to increase their military budgets without any real European coordination or alignment with a common strategic vision at Union level. Each EU country can fund more or less whatever it wishes.

¹³ The EDPCIs concern a handful of strategic capabilities considered particularly important and costly, and deemed essential for the Union as a whole.

¹⁴ Article 35 of [Regulation \(EU\) 2025/2643](#) of the European Parliament and of the Council of 16 December 2025 establishing the EDIP programme.

¹⁵ European Parliament and of the Council of 16 December EDIP Regulation, "[Work programme for 2026-2027 for Regulation \(EU\) 2025/2643](#)", Annex to Commission Implementing Decision C(2026) 2174 final, Brussels, 30 March 2026

- **Case-by-case decisions based on needs** – The European Peace Facility (EPF) and the lending facility for Ukraine (of which €60 billion will be used to purchase weapons) are also based on political negotiations in response to needs that arise on a case-by-case basis.

With such a proliferation of initiatives, each relying on separate and disconnected mechanisms to identify funding priorities, the EU's defence industrial policy can hardly be compared to a ship following a clear course and capable of guiding its action over the medium and long term. It resembles instead a flotilla of small vessels — each representing an EU programme or initiative — drifting with the winds, without a common direction or clearly defined trajectory.

Yet, as noted above, many on both sides of the Atlantic — and particularly in Washington — believe that this course should be set by the Alliance itself and should avoid any duplication of NATO initiatives.

CAN THE EUROPEANISATION OF NATO LEAD TO STRATEGIC AUTONOMY?

The idea that the EU's military-industrial priorities should be defined within the framework of a NATO that may be more Europeanised, yet remains under American control, could raise several problems for Europeans. First, some EU Member States are not members of the Alliance, and their needs might therefore not be fully taken into account. More importantly, NATO's capability priorities do not necessarily coincide with those that Europeans need to pursue in order to strengthen their strategic autonomy.

To understand why, it is worth briefly examining NATO's defence planning system. This is based in particular on the NDPP, which helps to shape — or at least guide — the Allies' long-term capability requirements. NATO planning, however, naturally factors the United States' capabilities into the equation.

This is precisely where the difficulty lies: European strategic autonomy is defined to a large extent in relation to Europe's dependence on the United States. As long as Washington retains its leadership within the Alliance, even amid a relative disengagement from the European continent, the United States is likely to continue providing NATO with certain critical military capabilities, particularly in areas such as strategic enablers, intelligence, surveillance and reconnaissance (ISR), command and control (C2), and data processing.

Certain NATO acquisitions appear to confirm that, in terms of command at least, the United States has no intention of relinquishing its hegemony over the Allies. The step back announced by the Trump administration has not prevented the Americans from imposing certain choices likely to fuel European dependence, particularly through the NATO Communications and Information Agency (NCIA), which is the Alliance's digital arm and aims to achieve information dominance. In November 2025, for example, Google Cloud and Oracle signed contracts with the NCIA to provide highly secure sovereign cloud capabilities¹⁶. A few months earlier, in March 2024, the NCIA had also purchased the Maven Smart System (MSS) artificial intelligence platform from the Californian company Palantir Technologies. According to several experts, Maven represents a genuine strategic turning point in NATO's conduct of warfare¹⁷. This system was initially deployed by the Pentagon to utilise AI in identifying targets in satellite imagery or from drone feeds. Within NATO, the Maven Smart System is set to become the backbone of CJADC2 (Combined Joint All-Domain Command and Control): more specifically, it is intended to link different weapons systems from different allied countries so that they operate as a single entity. In other words, this system aims to strengthen the Alliance's command capabilities through intelligence fusion, improved situational awareness, targeting and the acceleration of decision-making processes¹⁸. As such, it represents a cornerstone of any independent operational capability.

The fact that the Americans continue to make their considerable technological lead in the digital sphere available to NATO is undoubtedly good news. But at a time when US security guarantees are more uncertain than ever, this does not resolve the issue of European strategic autonomy. In this regard, it must not be forgotten that NATO is not merely a defensive military alliance. Whether Europeanised or not, it will also remain a complex structure that governs capability cooperation between its members and influences their procurement, driven by the most powerful of its members: the United States.

This means that if the EU relies solely on the NDPP and other NATO mechanisms to identify the priorities for its defence industrial policy and joint procurement, it will never develop the capabilities and strategic enablers that the United States brings to the Alliance – and which it desperately needs in order to act independently of Washington's will. In other

¹⁶ Google Cloud, ["NATO and Google Cloud Sign Multi-Million Dollar Deal for AI-Enabled Sovereign Cloud"](#), *PR Newswire*, 24 November 2025

¹⁷ According to Pierre Sauveton, founder of Opex News, the NATO MSS is a platform that 'goes to the heart of the way NATO thinks and conducts its operations': ["How Washington has established itself at the heart of French defence without firing a single shot"](#), *OpexNews*, 5 April 2026.

¹⁸ EIRPE Says, [The Maven Smart System \(MSS NATO\)](#).

words, Europeans must look beyond NATO and the NDPP: they must even be able to duplicate certain key military capabilities currently provided by the United States.

In fact, the EU has already done so in its recent history. Its most significant achievement in terms of capabilities is the Galileo satellite navigation constellation, which must be regarded as a key strategic catalyst. The importance of Galileo is now unanimously recognised within the EU and even across the Channel. Yet Galileo is nothing more than a duplication of the American GPS. And it is certainly not within the framework of the NDPP that Europeans would have been driven to develop this kind of strategic enabler, which is indispensable to any ambition for autonomy.

THE CHALLENGE OF CAPABILITY PLANNING AND THE NEED FOR A STEERING BOARD

The European Union must therefore establish its own planning capacity, in order to better direct its military-industrial resources towards choices consistent with its objective of strategic autonomy. This is by no means a question of ignoring or contradicting the NDPP, nor the other initiatives undertaken within NATO, but rather of drawing inspiration from them whilst being able, where necessary, to go beyond them. To this end, the EU needs a forum, a structure and a procedure dedicated to this task.

In fact, the European Commission had envisaged such a forum and structure. In its initial proposal for the EDIP, it had envisaged the creation of a Board bringing together the Member States, the European Defence Agency and the Commission itself, in order to plan the numerous actions envisaged by the programme¹⁹. The political nature that this Board was intended to have meant it could be seen as the embryo of a genuine capability planning structure, capable, where necessary, of going beyond the scope of the EDIP alone, whilst also guiding other instruments. The Member States, however, interpreted this proposal as an attempt by the Commission to encroach upon their national prerogatives and, for this reason, rejected it.

As such, to date the EU still lacks a common framework for aligning all its military-industrial policies around a clear and coordinated vision. This issue has, however, been revisited in the negotiations on the **European Competitiveness Fund (ECF)**, which is set out in the Union's next Multiannual Financial Framework for the period 2028–2034. The ECF is expected to bring

¹⁹ See Article 57 of the [initial proposal for the EDIP programme](#) presented by the European Commission on 5 March 2024.

together, amongst other things, the various European financial instruments designed to support the European Defence Technological and Industrial Base (EDTIB), in particular to harmonise the way in which they are managed.

In this context, the Commission has proposed setting up an advisory committee for the ECF as a whole²¹, as well as a '*Space and Defence Advisory Board*'²² and a '*Defence Industrial Advisory Board*' for actions specifically related to space and defence. The *Defence Industrial Advisory Board*, in particular, is expected to gather representatives from the Member States, the European Defence Agency, the High Representative of the Union for Foreign Affairs and Security Policy, and the Commission itself. Its objective would be to assist the European executive in implementing defence industrial policies, particularly with regard to a 'long-term investment strategy for defence policy (...)'²³.

At the time of writing, the role and composition of the Defence Industrial Advisory Board remain unclear and, indeed, somewhat confused. Its name suggests that it is intended merely as an advisory structure, rather than as a body responsible for coordination and decision-making. Yet the Union does not need another advisory body. Still less does it need a structure operating at an intermediate level to oversee the instrument's day-to-day management. Under EU law, the routine management of Union programmes, including the future ECF, already falls to programme committees. These committees bring together representatives of the Member States, who examine and either approve or reject the work programmes proposed by the Commission.

The EU does, however, need a forum in which the political direction of its funding for the defence industry and military procurement can be defined. The European Parliament's committees on security and defence and on industry — SEDE and ITRE²⁴ — have therefore proposed replacing the Advisory Board with a **Steering Board** responsible for guiding the defence industrial policies covered by the ECF²⁵. This body would regularly bring together political decision-makers, rather than merely diplomats or officials.

To strengthen the coherence of European action, the EU could also consider adopting a **multiannual — rather than annual or biennial — work programme** specifically covering the

²¹ Article 14 of the Proposal for a Regulation of the European Parliament and of the Council on establishing the European Competitiveness Fund ('ECF'), including the specific programme for defence research and innovation activities, COM/2025/555 final, 16 July 2025.

²² Ibid, Article 41.

²³ Ibid, Article 56.

²⁴ Committee on Industry, Research and Energy

²⁵ Amendments 182–190, Opinion of the Committee on Security and Defence for the Committee on Industry, Research and Energy on the proposal for a regulation of the European Parliament and of the Council on establishing the European Competitiveness Fund ('ECF'), 2025/0555(COD).

ECF's defence and space instruments. Such a programme would embed the various ECF tools within the long-term strategic vision that is currently lacking. The possibility of adopting a multiannual work programme is, moreover, explicitly envisaged in the Commission's proposal establishing the ECF²⁶.

The question, however, is whether the Member States are ultimately prepared to adopt measures of this kind. Will they be willing, this time, to sit alongside the Commission on a Steering Board? Will they also accept the adoption of multiannual work programmes at EU level to guide policies supporting the EDTIB?

The forthcoming negotiations on the Competitiveness Fund will provide an answer. As regards the Steering Board in particular, the Member States may challenge its institutional location, especially if it is to be chaired by the Commission. National capitals may instead prefer such a body to be placed under the authority of an intergovernmental EU agency, such as the European Defence Agency, whose role they are also considering strengthening²⁷.

In any event, any capability-planning structure will necessarily have to involve the Commission, since it is responsible for implementing the Union's general budget and for the practical delivery of programmes supporting the EDTIB. More fundamentally, the European executive is tasked with safeguarding the general interest of the Union. Yet it is precisely this common interest that the Member States struggle to define and pursue when acting on a purely intergovernmental basis.

²⁶ See recital 50 of the European Commission's [proposal on the ECF](#).

²⁷ European Defence Agency, "[Ministry of Defence Paves the Way for a Stronger European Defence Agency](#)", press release of 11 May 2026.

CONCLUSION

When drawing up their capability plans, EU countries face a particularly complex equation. They must assess their requirements at three distinct levels: national, NATO and European. These three levels are closely interconnected, yet coordinating them remains difficult, not least because they are not always fully aligned. In some cases, they may even diverge. Squaring this circle is therefore no easy task.

As we have seen throughout this article, NATO's capability requirements are those of an alliance in which the United States will continue, whatever Donald Trump may say, to occupy a pre-eminent position and provide critical capabilities. By contrast, planning at national and European levels must also take account of scenarios in which the United States — or even NATO itself — would no longer form part of the equation.

Whether Europeanised or not, NATO could find itself sidelined precisely because the United States will continue to exert a dominant influence within it. In the current context, it is no longer possible to rule out the possibility that Washington might one day paralyse the Alliance in order to prevent a military intervention that Europeans regarded as necessary but that the United States considered contrary to its own interests.

It is precisely for this reason that Europeans must be able to jointly identify, plan, develop and acquire the capabilities required for their strategic autonomy, including outside the NATO framework. To achieve this, however, they need the European Union.

APPENDIX I: THE STRATEGY FOR COOPERATION BETWEEN NATO AND INDUSTRY ADOPTED AT THE 2026 NATO SUMMIT IN ANKARA

In Ankara, the Allies adopted a “Strategy for Cooperation between NATO and Industry”, designed to redefine the framework for their relations with defence industry companies.

This strategy is structured around three main objectives²⁸ :

1. Strengthening dialogue between NATO and industry, in order to improve visibility of the Allies’ requirements and facilitate cooperation with industry.
2. To support innovation and ensure that emerging technologies meet the Alliance’s interoperability requirements.
3. To encourage the build-up of industrial capabilities and ensure their sustainability.

Known as SYNC, the strategy sets out several mechanisms, structures and initiatives to achieve these objectives, including the creation of a new NATO single point of contact for industry. It states its intention to take account of initiatives already undertaken by the European Union in order to avoid duplication. In practice, however, it overlaps with several of them.

This is particularly the case with measures designed to facilitate the transition of new technologies to the production and procurement phases, which are reminiscent of those recently implemented by the European Union under the AGILE programme. NATO’s strategy also aims to simplify and accelerate procurement procedures to enable the integration of emerging technologies into weapons systems. Here too, the European Union has just adopted comparable provisions under the Defence Readiness Omnibus, which amends Directive 2009/81/EC on defence procurement²⁹.

It should also be emphasised that the strategy seeks to provide industry with greater visibility regarding the Allies’ capability requirements, as defined within the framework of the NDPP. More specifically, the strategy provides for the Alliance to issue to industry ‘an aggregate demand signal, based on the NDPP’, in order to give them greater visibility of NATO’s capability requirements and enable them to invest and plan for the long term. As the NDPP is a classified process, the Alliance intends to convey this signal to the defence industry in two forms: a version suitable for public release and a classified version.

²⁸ NATO, “Strategy for Cooperation between NATO and Industry”, 8 July 2026.

²⁹ NATO, “Strategy for Cooperation between NATO and Industry”, 8 July 2026.

NATO also intends to keep industry representatives informed of opportunities for aggregating demand, particularly for multi-year requirements covered by multinational procurement and for cooperation initiatives between several Allies³⁰.

More generally, NATO is not merely seeking to deepen its relations with industry. It also aims to foster cooperation and links between companies in Allied countries. This dynamic could lead to a form of “NATOisation” of the defence industrial and technological base, whilst the European Union, for its part, continues its Europeanisation. The more closely North American and European companies become intertwined, the more difficult it could become for the European Union to apply eligibility criteria based on European preference.

³⁰ points 9 and 12 of the Strategy.

Strategic expertise in complete independance



PROGRAMME
EUROPE,
EUROPEAN UNION,
NATO



2 bis, rue Mercœur - 75011 PARIS / France

+ 33 (0) 1 53 27 60 60

contact@iris-france.org

iris-france.org



IRIS is one of the main French think tanks specialising in geopolitical and strategic issues. It is the only one to have the singularity of combining a research centre and a teaching centre delivering diplomas, via its IRIS Sup' school, a model that contributes to its national and international attractiveness. IRIS is organised around four areas of activity: research, publication, training and event organisation.