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(PONOVRNO) »PRIDOBIVANJE MIŠIC«: ZMANJŠANJE ODVISNOSTI EVROPE OD AMERIŠKE OBRAMBNE INDUSTRIJSKE BAZE

(RE)BUILDING MUSCLE: REDUCING EUROPE'S DEPENDENCE ON THE U.S. DEFENSE INDUSTRIAL BASE

Povzetek Članek analizira odvisnost Evrope od ameriške obrambne industrije in strategije za zmanjšanje te odvisnosti. Ruska invazija na Ukrajino, vojna v Izraelu in zaščita mednarodnega ladijskega prometa so obremenile ameriško industrijo in razkrile ranljivosti evropskih zalog. Članek ugotavlja, da je krepitev evropske obrambne industrije strateško koristna za Nato, saj povečuje sposobnost odvrčanja Rusije in zmanjšuje politično ter vojaško odvisnost od ZDA. Predlaga povečanje evropske proizvodnje, sodelovanje pri licencirani souporabi, nakup opreme od drugih zaveznikov in trajne investicije v obrambni sektor za dolgoročno odpornost.

Ključne besede *Evropska obrambna industrija, ameriška obrambna industrija, strateška avtonomija, Nato, odpornost.*

Abstract The article analyzes Europe's dependence on the US defense industry and strategies for reducing this dependence. The Russian invasion of Ukraine, the war in Israel, and the protection of international shipping have strained the US industry and exposed the vulnerabilities of European stocks. The article concludes that strengthening the European defense industry is strategically beneficial for NATO, as it increases Russia's deterrence capability and reduces political and military dependence on the US. It proposes increasing European production, cooperating on licensed sharing, purchasing equipment from other allies, and making sustained investments in the defense sector for long-term resilience.

Key words *European defence industry, U. S. defence industry, strategic autonomy, resilience.*

Introduction Responding to Russia's invasion of Ukraine, arming Israel in its war against Hamas, and protecting international shipping off Yemen have strained the US defense industry and reduced stockpiles of many munitions. These recent conflicts have also provided new information about the conduct and demands of future wars. The United States and its allies have not been stagnant. Increased political attention and funding have begun to address the problem of limited defense industrial capacity. However, existing efforts are more of a band-aid than a long-term fix. Hence the question – what steps can the United States and Europe take to reduce NATO dependency on US defense industrial capacity?

Both the United States and European NATO members have a strategic interest in reducing NATO's dependency on the U.S. defense industrial base. Moving NATO to a less dependent, more self-sustaining defense industrial posture will be a net positive for the Alliance, both militarily and politically. This does not mean that European NATO members should or will stop buying U.S. military equipment, nor does it mean pulling the United States out of the Alliance. American capabilities will still be an important part of European military inventories, but in an ideal world these capabilities would fill essential gaps or be stockpiled alongside equipment that is primarily produced in Europe in large quantities.

This article has three sections. First, it establishes why reducing Europe's dependence on the U.S. defense industrial base is in the best interest of both parties. Second, it explains why continued dependence is a problem by drawing on lessons from the war in Ukraine, persistent issues with regard to U.S. arms sales policies, and other demands being placed on the U.S. defense industry. Third and finally, it offers several policy recommendations that the United States and Europe could take individually and collectively to move Europe out of dependence and toward a more sustainable defense industry posture.

1 THE STRATEGIC CASE FOR A NEW DEFENSE INDUSTRIAL BALANCE

Reducing Europe's dependence on the U.S. defense industrial base is in the strategic interest of both the United States and its NATO allies.¹ As conventional military threats in Europe and around the world grow, a European defense industrial base capable of producing high-quality equipment at sufficient scale improves the ability of NATO to deter a Russian attack against it. Moreover, moving from dependence to a more equitable defense industrial arrangement would put European NATO members in a better position to navigate transatlantic political uncertainty emanating from Washington.

This new defense industrial balance does not mean that European states should cut out U.S. capabilities entirely; American equipment will still form a sizeable portion

¹ *An in-depth investigation of this dependency goes beyond the aims of this paper. For an empirical overview, see Mejino-López and Wolff 2025.*

of European militaries' inventories. The goal is instead to put Europe in a better position to manufacture most of its own military capabilities, with U.S. equipment filling key gaps and padding stockpiles of advanced guided munitions which are mostly filled by European-made munitions.

1.1 Improving Conventional Deterrence

Regardless of how or when the Russia-Ukraine War ends, European NATO members will need to strengthen their defense industrial base to improve conventional deterrence against future Russian aggression.²

Russia has been able to sustain its invasion of Ukraine despite staggering losses of both personnel and equipment. According to a recent Center for Strategic and International Studies report, "Since January 2024, for example, Russia has lost roughly 1,149 armored fighting vehicles, 3,098 infantry fighting vehicles, 300 self-propelled artillery, and 1,865 tanks" (Jones, McCabe, 2025, p 2). To illustrate the scale of these losses, there are only two NATO members which have more tanks in their entire armed forces than the number of Russian tanks destroyed in Ukraine in a year and a half of combat: Turkey and the United States (Global Firepower, 2025). Russia has persisted despite these loss rates due to a mix of foreign support from countries like Iran and North Korea and, to a greater extent, because it mobilized its military industrial capacity once it became apparent that the war would not be quick and decisive (Danylyuk, Watling, 2025, pp 7–27). Devoting so much economic activity to the war effort could have very negative medium- and long-term consequences for Russia, but if European NATO states want to deter aggression, the scale of Russia's defense industry makes for a daunting challenge.³

Since the end of the Cold War, Europe's defense industrial environment has primarily focused on producing high-quality equipment, but on a relatively small scale (International Institute for Strategic Studies, 2024, p 44). This phenomenon also occurred in the U.S. defense industrial base, but to a lesser extent. The United States industrial base has also seen faster expansion in production lines since the start of the Ukraine war, especially for high-demand munitions like Patriot interceptors, AIM-120 air-to-air missiles, and HIMARS guided rocket systems (Baker, 2025; Lockheed Martin, 2025). This means that European NATO militaries are highly capable but may not have much staying power, given their smaller size and the difficulty of replacing expended or destroyed capabilities.⁴

² In this study, conventional deterrence is understood as the ability to deny an aggressor the attainment of their battlefield objectives through conventional military means (Mearsheimer, 1983, pp 15). For more on the theoretical concept of conventional deterrence see also: Huntington, 1983, pp. 32–56; Shimshoni, J. 1988; Harknett, 1994, pp 86–114.

³ Tangent to the question of the conventional deterrence capacities of Europe, there is an ongoing academic and policy debate on whether Europe can defend itself against Russia without the United States. For example: Posen, 2020, pp 7–20; Meijer; Brooks, 2021, pp 7–43; Drozdiak et al., 2024; Burilkov, Wolff, 2025.

⁴ In fact, Europe is also lacking in fundamental lowtech armaments; see Alviz, 2025.

This makes conventional deterrence heavily reliant on American forward deployed military capabilities and the U.S. defense industry for constant replenishment. Additionally, it limits NATO's warfighting options if deterrence fails. If Europe's defense industrial base cannot sustain protracted, high-intensity conflict, then political leaders may feel pressure to adopt conventional military strategies which need to escalate to win a quick war or back down to avoid conflict altogether. A military strategy against Russia which requires rapid, large-scale, and deep attacks against command and control, air defense systems, and other enabling capabilities to capitalize on NATO's qualitative edge but weak ability to sustain a longer fight due to low defense industrial capacity could carry higher risks of nuclear escalation, as Russia has consistently stated that it could use nuclear weapons to respond to an "air-space war" by NATO (Oliker, 2019).

A stronger European defense industrial base changes the conventional warfighting calculus by creating more flexibility for military planners. This does not necessarily mean that NATO will fundamentally change its approach to conventional deterrence or warfighting, but under current defense industry conditions the range of viable conventional military strategies is limited. European NATO members have already proven capable of manufacturing high-quality military platforms and munitions. Now these countries need to scale up production to ensure that they will be able to meet the demands of modern and future warfare. Success will greatly improve Europe's ability to deter Russian aggression, with or without high levels of U.S. support.

1.2 Political Advantages of a Stronger European Defense Industrial Base

Reducing Europe's dependency on the U.S. defense industrial base bestows political benefits on both sides of the Atlantic.

For Europe, the primary political benefit of a stronger defense industrial base is a political buffer against changing views in Washington on the value of the transatlantic alliance. Complete U.S. abandonment of NATO is unlikely, but the Trump administration is clearly willing to twist arms to get European states to do more for the Alliance (Al Jazeera, 2025). Moreover, Trump's perspectives on Alliance burden shifting are shared by a cadre of influential, younger Republican politicians, so European defense planners should not expect future Republicans to return to a pre-Trump foreign policy (Starcevic, Kayali, 2025). Democrats will approach transatlantic relations differently, but one likely area of commonality with Republicans is the expectation that European NATO members will continue to shoulder more of the burden for the continent's defense, including by expanding Europe's defense industrial capacity (Bond, Scazzieri, 2024).

The United States also gains political benefits if Europe is less dependent on the U.S. defense industry. The need to devote more military resources to deterring conflict in East Asia has been a consistent, bipartisan political message since the Obama

administration. Presidents from both parties have struggled to follow through on this priority. There are many contributing factors to this failure to pivot, but perhaps the biggest difficulty in focusing on China has been the pull to intervene in other conflicts in Europe and the Middle East. This temptation will still exist if Europe expands its defense industrial base, but if NATO countries can better provide for their own defense, then one line of argument – that in the absence of U.S. intervention no other state or group of states can effectively respond to a crisis – becomes weaker.

Importantly, reducing European dependence on the U.S. defense industrial base is no longer necessarily an argument for U.S. companies losing out on business, which is one argument for keeping allies dependent on U.S. military equipment. In the absence of a major economic collapse, there is political support in Washington for increasing defense spending – the need to counter China's military growth is a rare area of bipartisan agreement. Any potential losses in orders from European NATO members will therefore likely be made up by increased demand from the U.S. military. Additionally, European militaries will still want to purchase U.S. equipment to fill capability gaps and stockpile munitions, so a reduction in dependence does not mean a full stoppage of purchasing. A stronger European defense industrial base could therefore create more favorable political conditions for the United States to focus more attention on Asia without hurting the American defense industry.

2 SCOPING THE PROBLEM: WHY THE STATUS QUO IS UNSUSTAINABLE

Instead of expanding its own defense industrial capacity, Europe could continue to bet on the United States, that Washington will have incentives to expand its own industrial capacity enough so that Europe does not need to make fundamental changes. This would be the path of least resistance, but it would also come with considerable risks.

2.1 The Problem with Foreign Military Sales

The primary mechanism the United States uses to get more capable, technically sophisticated weapons to NATO allies is through the Foreign Military Sales or FMS process. Russia's invasion of Ukraine sparked a massive buying spree by European NATO members. According to the U.S. Department of War, FMS arms sales to NATO allies accounted for \$20 billion in the fiscal year 2022 and \$24 billion in the fiscal year 2023 (Lopez, 2024). Between late January and the end of September 2025 – Trump's second term so far – Congress received notification of \$39 billion worth of arms sales to European NATO members.⁵

⁵ Figure compiled by the author. Includes FMS cases notified to Congress and posted on the Defense Security Cooperation Agency (DSCA) website, and notifications of amendments to existing FMS cases. For amended FMS cases, only the dollar value of new equipment – not the dollar value of the overall FMS case – is recorded.

This high level of demand for U.S. weapons shows that Europe is serious about increasing defense spending, but the FMS process is not known for speed. The time between FMS cases being notified to Congress, as required by the Arms Export Control Act, and final delivery can stretch on for many years. Taiwan, for example, is still waiting for the delivery of weapons which were notified to Congress in 2017 (Gomez, 2024a). The ongoing surge in arms sales produces impressive numbers, but it also means that the U.S. defense industry is contending with a massive surge in demand that it may struggle to fulfill (Gomez, 2024b).

To give a concrete example, between January 1, 2025, and mid-October 2025, the United States announced sales of approximately 6,000 AIM-120 air-to-air missiles, many to NATO states. In 2024, Raytheon said it could produce 1,200 AIM-120s per year, meaning it would take five years of production to fulfill this demand (Everstine, 2024). However, the U.S. military also uses the AIM-120 and is looking to increase its inventories of the missile, so there is competing demand, which means long gaps between FMS cases being announced and being fulfilled will persist, despite increased production capacity. The AIM-120 FMS example is a recurring issue for arms sales. Over the past three years, the U.S. defense industry has successfully expanded several key production lines for high-demand capabilities, but demand has increased alongside the increase in production, so there has not yet been a significant reduction in time between FMS notification and delivery.

Washington is trying to reform its arms sale processes to speed up deliveries of weapons, but progress has been slow (Gomez, 2025). Since May 2023, the State Department, War Department, and Congress have released reports which outline plans to streamline the arms sale process. In the summer of 2025, the House Foreign Affairs Committee, which has oversight on arms sales given the State Department's legal authorities, referred several bills to the full House of Representatives which would make small yet welcome adjustments to the FMS process. However, even if these recent adjustments become law, they will likely have a relatively small impact on delivery timelines given the mismatch between capacity and demand. Reducing bureaucratic red tape can only speed up the FMS process so much if demand for weapons is outstripping even an expanded capacity to produce them.

European NATO states should not stop buying U.S. weapons through the FMS process, but they should be aware that increasing arms purchases from the United States is a complement to expanded European defense industrial capacity, not a substitute. U.S. arms sales will help European states reach their defense goals, but persistent issues with the FMS process and the supply-demand mismatch described in this section should caution European leaders from seeing the FMS as the solution to their problem.

2.2 Opportunity Costs and Deterring China

Another risk of continued European dependence on the U.S. defense industrial base is the different military capability requirements of the U.S. military's pacing challenge – deterring a Chinese attack on Taiwan – and the requirements of European

states. The U.S. military wants to have as much flexibility as possible in its force design, but a military optimized to prevail in a maritime conflict in the Western Pacific will look different from one optimized to defend Eastern Europe from Russia. There are overlapping requirements, to be sure, namely the need for air and missile defense systems, stealth aircraft, and long-range logistics. But European NATO states, especially those close to Russia, will need large quantities of equipment which would not be as important in a U.S.-China conflict scenario given the geography of the Western Pacific, such as shorter-range artillery, tanks, mobile ground forces, and short-range drones.

The U.S. defense industry exists first and foremost to fulfill the needs of the U.S. military. If deterring China is the most important mission for the U.S. military, then the U.S. defense industry should be producing capabilities that are best suited to that mission. This will not be a problem in every area, and in some cases, like air and missile defense, Europe can benefit by tacking on orders for capabilities which are also being produced to counter China. In areas where Europe needs capabilities which the U.S. defense industry is not well suited to manufacture, however, depending on the American defense industry could put Europe in a very risky long-term position.

This logic works the other way as well. If the United States structures its defense industry to better meet Europe's defense needs, then it may incur its own risks and costs for deterring China. The United States has the economic heft to reduce the risks from some of these tradeoffs, but if China continues to make progress in narrowing the military gap with the United States, then Washington could face greater urgency to optimize its defense industrial base. The long lead times associated with defense manufacturing means that a decision to optimize against one adversary over another would have to occur several years in advance to give the industry enough time to catch up. Given the persistent difficulties with the pivot to Asia mentioned earlier in this article, it appears that the United States has not made such an optimization decision yet. This is good news for Europe, but it could make deterring China harder in the late 2020s.

2.3 Lessons from the Ukraine War

Russia's invasion of Ukraine has underscored the fact that mass and production capacity still matter (Preble et al., 2025). As stated earlier, European NATO militaries (and many others around the world) spent the post-Cold War shifting away from mass and toward smaller, high-quality forces. Quality and precision have still been important factors in the Ukraine war, but both Russia's and Ukraine's ability to continuously field and refresh stocks of equipment despite high attrition rates have been equally if not more important.

Ukraine has been able to establish some large-scale indigenous production of one-way attack drones, other types of drones, and missiles, but for much of 2022-2024 it depended on the United States industrial base and, to a lesser extent, European

donations of U.S.-made equipment to stay in the war. The Trump administration's reductions in arms aid to Ukraine in early-to-mid 2025, as it pursued a diplomatic end to the conflict, highlight how dependence on one country's industrial base could be risky if there are differences between European and American interests (Roth, Holmes, 2025).

During the Biden administration, many European donations to Ukraine of major defense equipment, such as F-16 aircraft and artillery, were premised on the United States either selling better equipment or replacing the donated systems. For example, Estonia donated its entire 155mm howitzer arsenal to Ukraine in January 2023, one month after signing a contract for six U.S.-made High Mobility Artillery Rocket Systems or HIMARS (Adamowski 2022; Kyiv Independent, 2023). The six HIMARS were delivered in early 2025, but Estonia's defense minister has expressed concern about the timelines being too long (Martin, 2025). Belgium has pledged to donate up to 30 F-16s to Ukraine, but the pace of these donations is connected to the delivery timeline for F-35 jets from the United States (Shkarlat, 2025).

These two examples illustrate why European dependence on the U.S. defense industry is risky. European NATO members may have a compelling interest to send more support to Ukraine, but if they rely on the United States to replace the capabilities being sent to Ukraine then they could face a dilemma. Either send aid to Ukraine sooner, but then face potential slow deliveries due to an overburdened FMS process; or wait to transfer equipment until the U.S.-made replacements arrive, which puts Ukraine in a worse position. A stronger European defense industrial base would help get around this dilemma by providing an alternative source of equipment.

3 POLICY RECOMMENDATIONS

Moving Europe away from dependence on the U.S. defense industrial base will require multiple, simultaneous lines of effort. Several of these actions have already begun in some form and should be sustained and, if possible, accelerated. The goal of all these actions is to encourage the expansion of Europe's capacity to produce more of the weapons it needs or to acquire weapons from sources other than the United States.

3.1 Continue Investing in the European Defense Industrial Base

To their credit, many European states have increased defense spending and made investments to begin the work of expanding the defense industrial base since Russia invaded Ukraine.

The European Union has played a surprisingly prominent role in marshaling fiscal resources for self-defense improvements, including defense industrial base expansion. In March 2025, the European Union unveiled a strategic initiative called

‘ReArm Europe’ with the goal of mobilizing approximately \$850 billion⁶ ‘for a safe and resilient Europe’ (von der Leyen, 2025). At the time it was announced, the ReArm Europe plan was primarily focused on changing rules and regulations to give EU member states greater flexibility to invest more in defense (Clapp et al., 2025). In October 2025, the EU’s office for foreign affairs and security policy released a roadmap with detailed objectives and milestones for ReArm Europe – also known as Readiness 2030 (High Representative of the Union for Foreign Affairs and Security Policy, 2025). ReArm Europe is still in the relatively early stages so it is difficult to predict whether it will succeed, but it is refreshing to see the EU aiming high on self-defense and adding details to the plan so quickly.

NATO member states are also taking unilateral steps to invest in their respective defense industries, but the problem of insufficient defense industrial capacity will take time to fix. Poland is an example of the scale of the challenge. Warsaw has rapidly hiked defense spending since the invasion of Ukraine, going from 2.7% of GDP in 2022 to almost 5% in 2025 (Oleksiejuk, 2025). Poland is also involved in several \$1 billion-plus FMS cases for U.S.-made equipment, including for F-35 sustainment (\$1.85 billion), AIM-120D missiles (\$1.33 billion), Apache helicopters (\$12 billion), and Abrams tanks (\$6 billion).⁷ All of this increased spending is a welcome sign, but Poland’s defense industry is struggling to scale up its production, despite higher levels of spending (Ojewska, 2025; Minder, 2024).

Other NATO member states are going through similar general experiences, even if the details are unique to each country (Fehrenbach et al., 2025). More money is flowing into Europe’s defense industrial base and countries are making some progress, but getting Europe from where it is to where it needs to be will take more money and more time. Put differently in a New America think tank report on the topic, “For all the talk of European rearmament and strategic autonomy, the continent remains years away from fielding an industrial base capable of matching the speed, scale, or precision of American production” (Rondeaux et al., 2025).

Both individual European states and multilateral organizations like NATO and the European Union should be commended for taking action to correct decades of neglect of the continent’s defense industrial base. But it is important that they sustain this attention and investment to see the fruits of their labor. The United States should continue to express support for European rearmament and maintain its political expectation of increased burden sharing by its allies. Ultimately, however, it will be up to European capitals to sustain the momentum and build on these initial positive steps toward creating a more self-reliant defense industrial base.

⁶ The amount was €800 billion. The conversion to dollars is based on the exchange rate on the day that ReArm Europe was announced.

⁷ All figures obtained from Defense Security Cooperation Agency (DSCA) press releases notifying Congress of a potential FMS case.

3.2 Licensed Co-Production at Large Scale

Governments in Europe and the United States should take steps to simplify and streamline export licensing so that more U.S.-European licensed co-production of defense equipment can take place. Licensed co-production entails European companies producing components of or even complete units of weapons originally designed and manufactured by U.S. companies. Such arrangements are negotiated directly between the companies involved, but any U.S. companies involved in co-production need to obtain export licenses and other approvals from the U.S. State Department (Casazza, 2024).

Both the United States and Europe would benefit from more co-production arrangements. For Europe, co-production provides a lower-risk avenue for expanding the skilled workforce needed to build modern weaponry (since the higher-risk research and development has already been borne by the U.S. company). Europe could also get weapons faster than through the standard FMS process, which is wholly dependent on U.S. manufacturers and contracting timelines between the U.S. military and its defense industry. For the United States, co-production can relieve pressure on overburdened domestic supply chains by bringing in additional production capacity from the foreign partner company. Realizing these potential benefits, however, will depend on co-production agreements being for significant quantities of equipment. Co-production agreements which are too narrow in scope or too small in scale would not be as valuable for improving Europe's defense industrial capacity.

There are several examples of successful U.S.-Europe co-production agreements which should be built upon. Lockheed Martin partners with Polish companies to manufacture subsystems for the PAC-3 MSE interceptor, and in late 2024 a joint venture between European defense company MBDA and Raytheon to produce Patriot missiles in Germany broke ground on construction (Lockheed Martin, 2024; Burke, 2025). Poland plans to acquire nearly 500 Homar-A guided rocket launchers through a co-production agreement with Lockheed Martin, wherein U.S.-made HIMARS launch units will be integrated onto Polish-made trucks fitted with a Polish-made command-and-control system (Lockheed Martin, 2023).

Washington and European capitals should continue to work closely with their defense industries to find ways to expedite and otherwise ease the process of defense co-production. Recent history shows that U.S. and European defense companies are eager to find opportunities for co-production. Governments on both sides of the Atlantic should create legal mechanisms to fast-track the approval processes that go along with co-production, such as technology export licensing on the U.S. side. While the decision to engage in co-production is ultimately up to the defense manufacturers, governments can take policy actions to make the process quicker and easier.

3.3 Engaging with the Defense Industry Beyond the United States

Another way that European militaries can reduce dependence on the U.S. defense industry is to purchase more equipment from other friendly countries which face similar threats and have slack industrial capacity. South Korea is a prime candidate for meeting European defense needs, because it produces much of its own defense equipment while still buying from the United States to fill some key capability gaps, it has substantial manufacturing capacity, and its defense industry is optimized to build the types of capabilities that European countries need, as they are primarily dealing with ground and air threats. South Korean defense exports saw a significant uptick after the start of the Ukraine war, and frontline NATO states like Estonia and Poland have begun to buy major defense equipment from South Korea, including tanks, self-propelled howitzers, and rocket artillery systems (Lee, Corben, 2022).

Buying from other countries, such as South Korea, should be something that all European militaries ought to consider, but buying from other countries comes with some caveats. For example, having equipment from many different countries in one's military could significantly complicate logistics and sustainment. NATO member states already need to think about incorporating and sustaining equipment produced by the United States and various other European countries, thankfully with many decades of experience in interoperability. Adding capabilities from other countries should be considered but also carried out very carefully with the sustainment and logistics issues front and center.

Conclusion Russia's invasion of Ukraine was a sobering wake-up call for Europe. After three decades of shrinking defense industry and repeated calls from Washington to step up, the return of large-scale conventional war has finally prompted necessary increases in defense spending and investments in the continent's defense industrial base. Europe still has a long way to go before it is no longer dependent on the U.S. defense industrial base for providing high-quality capabilities at sufficient scale. Moving to a more equitable defense industrial balance will take a great deal of money and time, but both Europe and the United States have strong incentives to succeed.

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