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The Readiness Deficit: A Comparative Analysis of Procurement, Public Consent, and the Structural Limits of European Rearmament

By

Kipp Mann-Benn

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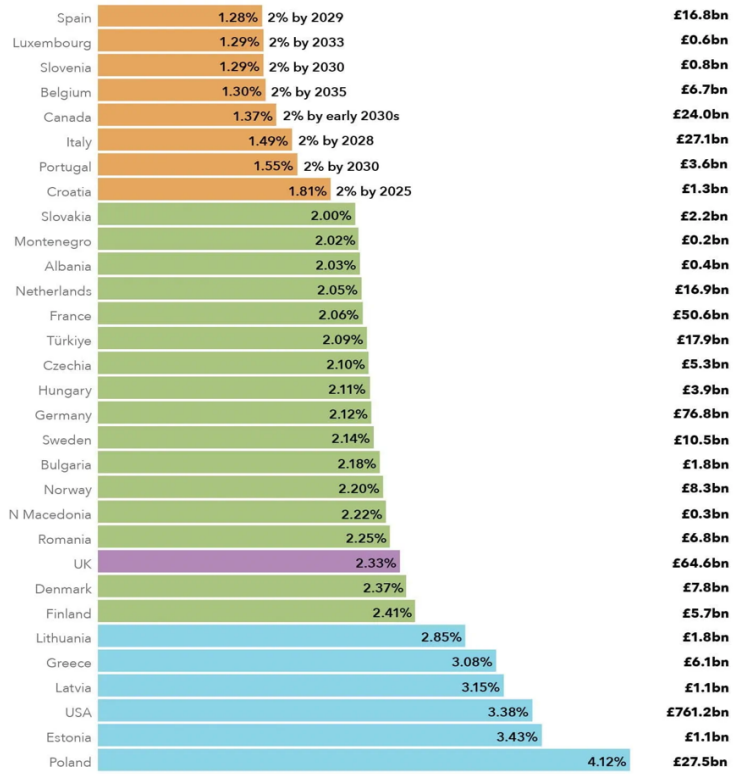
- European defence spending is at a post-Cold War high, yet across all major spenders the gap between declared ambition and delivered capability has rarely been wider.
- The UK presents a stark case: its Strategic Defence Review remains unfunded and undeliverable without a Defence Investment Plan, with measurable consequences now visible in both platform availability and the industrial base.
- Delivery trajectories vary considerably — Poland has produced unambiguous commitment; Germany has made historic structural changes but faces a procurement culture resistant to the pace its spending now demands; France and Italy lag on delivery despite public commitments.
- Underlying all of this is a shared structural failure: procurement systems designed for peacetime cannot convert record budgets into capability at the speed the threat environment requires.
- The most underexamined obstacle, and a key, under-analysed point of divergence between the UK and better-prepared European partners such as Finland, is the role of public consent — and the whole-of-society institutional architecture needed to build and sustain it.

Key Picture: The Readiness Gap: NATO Spending vs. GDP



Source: ICAEW

Introduction

Europe's security environment has deteriorated faster than its defence institutions have reformed: Russian submarines probe Atlantic and Arctic waters with increasing frequency[1], Iranian missiles have reached British sovereign territory, and the United States has demonstrated, in no uncertain terms, that it will act militarily in theatres vital to European interests without seeking European consent[2]. Each of these developments has pushed British and European defence conversations further and faster than even the shock of February 2022 managed – not because the invasion of Ukraine failed to concentrate policy minds, but because it allowed European governments the comfort of framing rearmament as a response to conflict happening elsewhere. This is no longer tenable.

Recent headlines from European capitals sound impressive. European Union (EU) defence expenditure rose again in 2025 to €381 billion – a real term increase of over 60% from 2020.[3] Central to this is Commission President von der Leyen's ReArm Europe plan, which aims to leverage €800 billion in defence spending by 2029.[4] Similarly, the United Kingdom's (UK) defence budget has also risen to £66 billion, with further increases promised in the next parliament, moving the UK's relative spend from 2.5% of GDP to 3%.[5] More broadly, NATO allies have also agreed to increase their relative spending on defence to 5% by 2035, a commitment unimaginable just five years ago.[6]

But spending figures, however impressive, are not the same as capability. The distance between allocated budgets and delivered readiness has never been more glaring – and nowhere is this more evident than in the UK.

When the UK Government launched the Strategic Defence Review (SDR) in the Summer of 2024, the rhetoric was expansive. The review's published conclusions in June 2025 declared that we must move to "warfighting readiness", sketching an ambitious hybrid navy, a British Army "10 times as lethal", and next-generation air power.[7] However, the gap between promise and delivery is stark. All of the major warship and support ship classes of the Royal Navy are in various states of retirement, repair, construction or crew regeneration, with only 4 of 13 frigates at sea, and 1 out of 5 attack submarines operational.[8]

The roots of this deficit predate the current government by many years. The question is therefore not one of blame but of response. However, the Defence Investment Plan (DIP), the document that was supposed to set out how the SDR's ambitions would be funded and delivered, has not yet arrived. In its absence, the rhetoric of warfighting readiness remains precisely that — rhetoric.

The Continent: A Tale Of Divergence

The picture across Britain's European partners is more varied, and in some respects more encouraging, though structural challenges remain common to all. Germany's 'Zeitenwende', or its defence posture turning point, as declared by then-Chancellor Scholz, has produced substantial structural change. For example, the Bundestag approved a historic reform of the constitutional debt brake, allowing defence spending above 1% of GDP to be exempt from fiscal constraints, while also creating a new €500 billion special investment fund.[9]

Berlin's stated ambition is to build the Bundeswehr into the strongest conventional army in Europe, with procurement reform efforts underway. However, challenges continue to persist. The aforementioned special plan will run out of funding by 2027, ammunition production still lags behind Russian rates, and procurement reform requires a sustained policy effort to undo years of peacetime bureaucratic caution.[10]

France presents a more mixed picture — active on strategic autonomy and with a strong industrial base evidenced by the Rafale export programme, but hampered by similar procurement constraints to the UK and no timetable attached to its 3.5% GDP ambition.[11]

Of all major European defence spenders, Poland's trajectory is the least ambiguous. With defence spending representing 4.12% of GDP, Poland is NATO's highest spender by share of national income.[12] Crucially, these are not aspirational spending commitments; Poland is placing and receiving large-scale orders of armoured vehicles, artillery, and air defence.[13] The shared border with Russia and a war on its eastern front prevented the guise of political distance that has allowed other European nations to conflate spending commitments with rearmament. In Warsaw, this distinction has never been possible.

Across all European countries, a common structural challenge persists, namely a defunct defence procurement strategy.[14] Nations are hampered by long lead times, a persistent culture of risk aversion, fragmented national markets, skills shortages in necessary engineering and manufacturing, and an over reliance on large contractors squeezing out innovative small and medium size enterprises seeking to shake up inefficient markets[15]. These issues cannot be addressed by significant cash injections alone.

The Missing Variable: The Politics Of Public Consent

There is a dimension of this debate that rarely surfaces in assessments of European rearmament, and it is arguably the most consequential for all European countries: the public. The aforementioned shortfalls, including procurement delays and the defence SME crisis, are largely problems of delivery. But behind them lies a political problem. As Evie Aspinall of the British Foreign Policy Group (BFPG) has argued pointedly this week, "if the assessment is that we must increase defence spending, the question isn't just how do we do it militarily, it is how to do it politically".[16]

The BFPG's own polling is instructive. Britons felt safer in 2025 than at any point since 2017.[17] When asked about threats to their security, they reach for domestic issues such as the cost of living and anti-social behavior – not Russia, Iran, nor the closure of the Strait of Hormuz. Broad, abstract support for higher defence spending consistently collapses when respondents are asked to name what they would cut or what additional tax they would accept to fund it.[18] That is the political ceiling within which elected leaders must actually operate—and it is considerably lower than the one defence analysts draw from.

Here is where the contrast with some of the UK's European partners is most stark. Take, for example, Finland. Finland's model of 'comprehensive security' (*kokonaismaanpuolustus*) is not simply a military doctrine; it is a civic one.[19] Defence is constitutionally embedded as a shared national duty. Every Finnish ministry has a designated Head of Preparedness. The government holds wartime agreements with over 1,000 private firms.[20] The result is that Finnish public support for defence is not a political ask, rather a long settled expectation and one with strong public support and commitment.[21] This is not solely a function of Finland's proximity to Russia, though geography concentrates minds. It is a function of how Finland has chosen to communicate and institutionalise the idea of shared risk.

This does not suggest, however, that the UK should seek to export the Finnish model in its entirety. The UK and its geographies, histories, and political cultures are genuinely different. Nor does it suggest that garnering political support for a whole-of-society approach is a silver bullet for European rearmament in the absence of procurement reform and financing. However, a war economy does not begin with a procurement contract. It begins when a society decides, collectively, that it is prepared to pay the real price of its own security and in creating this consent, institutionalises it with regular contact between citizens and the concept of a whole of society resilience model. On that measure, the UK has further to travel than any spending figure yet acknowledges, and indeed further than many of its European counterparts.

NOTES

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