CEAFE — Centro de Estudios y Análisis sobre el Futuro de Europa

DEFENCE INDUSTRY

Monday, 16 November 2026 · 07:30

- **Section:** Defence Industry / Industria de Defensa
- **Window covered:** Friday 13 November 2026, 05:45 to Monday 16 November 2026, 05:45 Europe/Madrid (2026-11-13T04:45Z to 2026-11-16T04:45Z)
- **Compiled from:** the CEAFE Defence Industry section brief, the shared logs and @F_CEAFE posts.

Bruegel: Europe's bet on US technology for air superiority "is unravelling"

A Bruegel analysis published on 10 November (Burilkov, Ospital, Wolff), flagged on the European list by @AresGroup_EU, says that relying on the US industrial base for air and missile defence has become "a major strategic liability".

European countries ordered 1,519 Patriot missiles between February 2022 and the end of 2025, against 1,026 in the previous seven years. Europe accounted for 84% of Patriots ordered worldwide in 2022–2025. PAC-3 MSE deliveries rose from 385 (2023) to 620 (2025), but the backlog reached 4,300 missiles in May 2026, at least 35% of them for Europe. At current rates that is close to seven years of production. The US also told Europeans in early 2026 to expect further delays because of the Iran war. Patriots make up 67% of Europe's long-range air-defence launchers (182 of 304, using IISS data). France and Italy, which operate the European SAMP/T (Aster 30, Eurosam), have no Patriot orders.

Why it matters for Europe. This is CEAFE's argument in figures. Buying American was meant to secure availability and US commitment. Instead it created a technological path dependency and a seven-year queue controlled by another country's priorities. Bruegel concludes that, had Europe invested decisively in home-grown alternatives in 2022, "it would have made a major difference already by now". It calls for long-term order books for SAMP/T and the new 10-nation **Freyja** system (a prototype is possible by mid-2027). Germany, with 70 Patriot launchers, is the biggest exposed operator. The European alternative already exists but lacks orders.

What to watch. Freyja prototype timeline and funding (EDF/SAFE). German decisions on further Patriot or IRIS-T SLM/SAMP/T purchases. Bruegel recommends lobbying the US Congress elected in November 2026 for timely deliveries.

Sources

- X post 2121175629060022704
- bruegel.org

GLOBSEC: 71% of Europeans back an EU army

POLITICO (13 Nov) reports GLOBSEC's 2026 Trends survey of 14 countries (11 EU member states, Ukraine, the UK and the US).

It finds that 71% of respondents want the EU to have its own army, rising to 82% in Romania, 78% in Lithuania and 75% in France. The figures are 70% in Poland and Bulgaria and 69% in Germany. In the EU countries surveyed, 78% back developing the bloc's own defence capabilities alongside NATO, and 77% in NATO countries would vote to stay in the Alliance. More than a third of European respondents now see the United States as a security threat. That share is around half in Germany, France and Britain, and Germany is the only country where a majority holds that view. Commissioner Andrius Kubilius shared the story on the list: "Europeans want 'more Europe' and 'stronger Europe' inside of NATO".

Why it matters for Europe. Public opinion is ahead of governments. A European army, and the European industrial base needed to equip it, has majority support even in member states usually wary of integration. This gives political cover to European-preference rules in EDIP/SAFE procurement.

What to watch. The full GLOBSEC Trends 2026 report. Whether the Commission's defence-union proposals cite it.

Sources

- X post 2121321977881227680
- politico.eu

Italy raises GCAP spending to €875m while cutting army vehicle funds (Defense News)

Defense News (Tom Kington, 13 Nov) reports from Italy's delayed 2026 defence budget, sent to parliament this week.

Italy spent **€875m on GCAP** in 2026, against €625m in 2025 and a €275m forecast, and plans €696m in 2027. Spending on the Lynx/Panther programme with Rheinmetall (1,050 Lynx, 272 Panther, a €23bn deal) plus Ariete upgrades fell to €177m, against a €425m forecast. It is due to rise to €872m in 2027. Italy's F-35 programme (115 aircraft) cost €782m this year, below the €961m forecast. Programme outlays add up to about €12.8bn, up €307m.

Why it matters for Europe. Money is shifting towards a sovereign sixth-generation fighter built by European and allied industry (Leonardo, BAE Systems, with Japan) and away from the US F-35 line. That is positive for European R&D and jobs. Defense News notes that Germany is reportedly considering joining GCAP after the collapse of FCAS with France. That would bring the leading European economy into a programme that also includes Japan, and leave France outside. For CEAFE's line, Europe still has two rival fighter efforts and no single European programme. Italy's and Germany's choices will decide whether consolidation happens.

What to watch. A German decision on GCAP (observer status first, as Italy proposed; see the 15 Nov brief). Parliamentary approval of the Italian budget.

Sources

- defensenews.com
- aviomedia.net

Intra-European industrial moves: WB Group enters Germany, Diehl adds a shell line, Spain authorises PEM

WB Group (Poland) opens WB Germany.

- **WB Group (Poland) opens WB Germany.** On 10 November, Poland's largest private defence group launched WB GERMANY in Berlin, with its office opposite the Defence Ministry according to Handelsblatt. It also announced its first German acquisition, Regensburg drone-propulsion maker Smoto, which Handelsblatt says will produce motors for WB drones. WB cites the Polish-German defence cooperation agreement of June and Bundeswehr trials in September in which WARMATE loitering munitions scored a 100% hit rate (company claim). DW adds that WB plans to deepen partnerships with Volkswagen and Rheinmetall MAN Military Vehicles.
- **Diehl Metall and Diehl Defence** posted highlights from the inauguration of a new production line for DiNa 155mm artillery shell bodies in Röthenbach (no capacity figure given in the post).
- **Spain:** the defence industry association TEDAE welcomed the Council of Ministers' authorisation of the Special Modernisation Programmes (PEM) on 13 November. It says they give multi-year budget certainty, skilled jobs and "sovereign industrial capacities" for Spain and Europe. The note gives no amounts.
- **UK–Norway:** the UK will buy three Norwegian P1118-design vessels as motherships for uncrewed mine-hunting systems (£90m). The first is due in 2031, with an option for three more. The deal was confirmed by Wes Streeting and Tore O. Sandvik in Oslo on 12 November, just before this window (GOV.UK; Breaking Defense).
- **EDA** ran its first operational experimentation campaign outside the EU, in Switzerland, testing drones and ground robots for urban resupply and casualty evacuation with Swiss and EU companies.

Why it matters for Europe. These are the positive cases in the editorial line: cross-border European capital and production (a Polish group buying German suppliers), European ammunition capacity, and national programmes framed as European autonomy. As Handelsblatt notes, production in Germany is seen as the price of access to Bundeswehr money. Europe is applying a "local content" logic among its own members, which is healthy when it keeps the work inside Europe.

What to watch. PEM amounts and programmes (BOE / Council of Ministers note). WB Germany's further acquisitions.

Sources

- X post 2121209758266917208
- wbgroup.pl
- handelsblatt.com
- X post 2121139501825237231

- X post 2121301333554962755
- tedae.org
- gov.uk
- breakingdefense.com
- X post 2121157486140854630
- eda.europa.eu

US firms court European buyers: Gambit in Bavaria, V-BAT for Greece via NATO, F-16 marketing, Redwire in Riga

General Atomics hosted Bavarian Minister-President Markus Söder at GA AeroTec Systems in Oberpfaffenhofen to promote its Gambit collaborative combat aircraft for the Luftwaffe.

- **General Atomics** hosted Bavarian Minister-President Markus Söder at GA AeroTec Systems in Oberpfaffenhofen to promote its **Gambit** collaborative combat aircraft for the Luftwaffe. GA proposes "sovereign German and European mission systems" and possible integration or production in Bavaria, depending on orders (GA-ATS release; defence-industry.eu).
- **Shield AI:** NSPA ordered more **V-BAT** VTOL drones for the Hellenic Army and Navy (release of 11 Nov; quantity and value undisclosed). Greece approved 10 more on 23 July. First deliveries are due in January 2027 (Janes). Shield has opened an Athens office and signed an MoU with GEK TERNA on X-BAT.
- **Lockheed Martin Europe** ran F-16 posts ("Strengthening Europe's defense") and reposted Belgian F-16 drone-intercept scrambles from Lithuania. LM also promoted ATACMS and **PAC-3 ACE** (warhead tests against Class 3 drones, first flight planned next year).
- **Redwire** welcomed the US ambassador to its Riga facility, which the US Embassy calls "a leading supplier of uncrewed aircraft systems in the Baltic region".

Why it matters for Europe. US primes are using local assembly and "sovereign mission systems" to win European budgets. Final design authority, export control (ITAR) and software stay in the US. Every Gambit or V-BAT order is one fewer for European alternatives, such as Airbus's and Helsing's uncrewed combat aircraft projects, or Schiebel's Austrian-built Camcopter S-100 VTOL drone for maritime ISR. Contrast with US rules: a European firm that wants Pentagon work must set up a US subsidiary under FOCI mitigation, with a US-citizen board, and its products then fall under ITAR. Greece buying through NSPA does not change who controls the technology.

What to watch. A Luftwaffe CCA decision. Greek V-BAT deliveries in January 2027.

Sources

- X post 2121589104647319590
- ga-ats.com
- defence-industry.eu
- X post 2121154618063458719

- shield.ai
- janes.com
- X post 2121232918441800178
- X post 2121589081716961358
- X post 2121257181139886412

Space: Vulcan's first failure, Starship's first ship catch, and Europe's launcher gap

ULA Vulcan failed on 15 November.

- **ULA Vulcan failed on 15 November.** The first Vulcan flight for Amazon Leo (LV-01, 40 satellites) suffered an anomaly about 10 minutes into flight, during the Centaur V burn, and the payload was lost. It was ULA's first outright mission failure since 2006 and Vulcan's first flight in nine months, after solid-booster nozzle problems (ULA; Spaceflight Now; Reuters). Amazon has 38 Vulcan launches booked, plus 24 on New Glenn (grounded since a May pad explosion), **24 on Ariane 6** and 13 on Falcon 9 (Spaceflight Now).
- **Starship Flight 15** (launched 13 Nov, 22:47 UTC) deployed 26 Starlink V3 satellites. On 14 November, after about 22.5 hours in orbit, Ship 42 was caught by the launch tower for the first time. The Super Heavy booster diverted to splash down offshore and did not return as planned (SpaceX; The Verge; Spaceflight Now).
- **Rocket Lab's 100th Electron** (14 Nov, for Japan's iQPS) came after a HASTE launch for the US Space Force's **VICTUS HAZE** tactically responsive mission, 21 h 55 min apart. Rocket Lab says VICTUS HAZE lifted off 16 h 42 min after the Space Force call.
- **Europe:** Avio's CEO said the third Vega C launch of 2026 (six Thales Alenia Space IRIDE satellites for Italy) is slipping "very close to Christmas Day" because of late satellites. Avio now targets four, then five launches a year (European Spaceflight). ESA and ArianeGroup said October's Prometheus tests were not connected to the long-delayed Themis hop. Commissioner Kubilius toured Italian space industry (Leonardo, Thales Alenia Space, Telespazio, ALTEC, Argotec) on his "#EULaunchTour": "Increased satellite production requires European solutions for access to space."

Why it matters for Europe. The US is moving towards fully reusable heavy lift (SpaceX: 127 launches and about 1,787 t to orbit so far in 2026, per Flight Atlas; see shared/launches.md), while Europe has flown 6 Ariane 6/Vega C missions. Vulcan's grounding and New Glenn's shows that Amazon's 24 Ariane 6 launches are a strategic commercial anchor for Europe. Reliable Ariane 6 cadence and reusable European launchers (Themis, the European Launcher Challenge) are a sovereignty issue, as both Kubilius and the German Space Command panel with ICEYE, Isar and OHB stressed ("responsive space").

What to watch. The Vulcan failure investigation and its effect on US national-security launches (NSSL). The next Ariane 6 launch for Amazon Leo. The Vega C launch date.

Sources

- X post 2122034531658076417

- spaceflightnow.com
- reuters.com
- X post 2121715216597827756
- spacex.com post
- theverge.com
- X post 2121501709285638267
- X post 2121469752707322102
- X post 2121493681102278675
- europeanspaceflight.com
- X post 2121194408783819188
- X post 2121342038352503051
- X post 2121528833496981806
