Instituto Español de Estudios Estratégicos

Opinion Paper

06/2026 19/01/2026

Alberto Ferreres Fernandez

The Rearmament Era and the Preparedness of Spain's Defence Industry

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Abstract:

This article examines Spain's ability to undertake structural rearmament in an increasingly complex geopolitical environment. It explores the strengths and weaknesses of the national defense industry, assessing its production capacity, technological autonomy, and involvement in major European initiatives such as PESCO and the European Defence Fund. The study also analyzes the risks associated with technological dependence on the United States and the opportunities offered by deeper European cooperation to achieve genuine strategic autonomy. The findings suggest that budget increases alone are insufficient: a comprehensive industrial transformation, coordinated planning, and sustained investment in innovation are essential to develop autonomous, resilient, and capable armed forces prepared for 21st-century security challenges.

Keywords:

Spain, defense industry, strategic autonomy, technological dependence, PESCO, European Defence Fund, rearmament, military innovation, industrial capability, operative sovereignty, European Defence, industrial resilience.

How to quote:

FERRERES FERNANDEZ, Alberto. *La era del rearme y la preparación de la industria de la defensa española*. Documento de Opinión IEEE 06/2026. enlace web IEEE y/o enlace bie[3] (consultado día/mes/año)

Introduction

It is irrefutable that, since the end of the Cold War in 1991[1], a new era of American unipolarity began, bringing with it a profound shift in the global defense paradigm, especially in Europe, where a considerable de-escalation in military investment took place. As the principal adversary of the West for decades gradually disintegrated, the Old Continent began to relax and leave behind the state of tension in which it had lived since the end of the Second World War. The consolidation of the so-called *"Pax Americana"* embodied that relaxation: Europe saw the United States of America as its protector against any potential threat, and the new Russia under Boris Yeltsin[2] did not represent, at least at that time, a danger to Europe.

It was at that moment when European countries saw the perfect opportunity to begin de-escalating military expenditure and redirecting the resources previously allocated to defence toward other areas considered priorities in this new context. Spain, for instance, which in 1982 devoted 2.97% of its GDP to defence, began to reduce spending steadily until reaching a historic low of 0.81% in 2016[3]. This trend was accompanied by a relative increase in allocations to education and healthcare. In 2007, investment in education amounted to €3,272,795,972 (adjusted to current euros), a figure that rose to €4,922,745,740 in 2023. In healthcare, the increase was similar: from €5,643,885,223 in 2007 to €7,048,459,800 in 2023[4]. This budgetary redirection reflects a profound shift in national priorities, favouring social welfare over military preparedness, a phenomenon common to most Western democracies after the fall of the Soviet bloc. However, since 2016, defence spending has once again begun to rise, driven by the progressive deterioration of the international environment, which is increasingly unstable and aggressive, thus reopening the debate on the need for rearmament in Europe and, in

[1] *Fin de la guerra fría: compromiso global selectivo*. (1991, septiembre 1). Política Exterior. https://www.politicaexterior.com/articulo/compromiso-global-selectivo/

[2] *Borís Yeltsin*. (s/f). Cidob.org. Recuperado el 21 de julio de 2025, de https://www.cidob.org/lider-politico/boris-yeltsin

[3] *España - Gasto público Defensa*. (2025b, febrero 5). Datosmacro.com. https://datosmacro.expansion.com/estado/gasto/defensa/espana

[4] DÓNDE VAN MIS IMPUESTOS?, *Políticas, ejercicio 2007*, disponible en: https://dondevanmisimpuestos.es/politicas#view=functional&year=2007

particular, on whether States truly possess the capacity to transform budgetary increases into effective and sustainable military power.

Thomas Hobbes, in his work *Leviathan*, spoke of the "state of nature" as a condition in which, in the absence of a superior authority, human beings, and by extension, nations, tend to act driven by fear, distrust, and the desire for power, falling into a logic of constant confrontation[5]. The contemporary international system seems to reproduce that Hobbesian dynamic: an environment where mistrust and competition once again emerge as the driving forces of relations among States, returning Europe to a logic of rearmament that was thought to have been overcome.

We may perhaps draw a parallel with the 1920s, when European countries, after the First World War and taking advantage of those years of economic boom and prosperity known as the "Roaring Twenties[6]", decided to reduce their military spending and invest more in other areas. England and France, for instance, during that decade lowered their military expenditure to below 2% of GDP[7]. A policy that, barely a decade later, would leave them ill-prepared for the rise of Nazi Germany and its strong military build-up, which they were unable to confront effectively due to their earlier relaxation in matters of defence[8]. Both nations found themselves forced to accelerate investments throughout the 1930s, turning a blind eye as Germany annexed countries such as Austria and Czechoslovakia in order to gain time to rearm. Furthermore, given their limited military capacity, they were compelled during the war period to invest enormous sums, Britain, for example, had to increase its defence expenditure to 55% of GDP[9], to meet the demands of the conflict.

Therefore, it is essential to emphasise that rearmament will not be effective solely through an increase in spending. If the national and European defence industries are not capable

[5] *Estado de naturaleza - Encyclopaedia Herder*. (s/f). Herdereditorial.com. Recuperado el 21 de julio de 2025, de https://encyclopaedia.herdereditorial.com/wiki/Estado_de_naturaleza

[6] Cunningham, & M., J. (2025). Roaring Twenties. En *Encyclopedia Britannica*.

[7] OUR WORLD IN DATA, *Military spending as a share of GDP*, disponible en: https://ourworldindata.org/grapher/military-spending-as-a-share-of-gdp-gmsd

[8] Mason, P. (2024). Lessons from the 1930s: Rearm according to the threat, not the fiscal rules. *Council on Geostrategy*. https://www.geostrategy.org.uk/britains-world/lessons-from-the-1930s-rearm-according-to-the-threat-not-the-fiscal-rules/

[9] *WWII: military spending as a share of income 1939-1944*. (s/f). Statista. Recuperado el 21 de julio de 2025, de https://www.statista.com/statistics/1333250/wwii-military-spending-share-income/

of sustaining it continuously and autonomously, any effort could prove insufficient. Rearmament is not merely about acquiring military equipment; it also entails developing an adequate logistical infrastructure, consolidating a coherent operational doctrine, training and retaining qualified personnel, and ensuring a strategic and resilient supply chain. All these elements must evolve in a coordinated and sustained manner. Likewise, rearmament must be conceived with a clear long-term vision, avoiding the early obsolescence of the capabilities acquired and ensuring that the budgetary increase translates into genuine strategic autonomy and deterrent capacity.

The new geopolitical scenario: urgency for rearming

The global landscape is currently at its most delicate point in decades. In fact, 2024 was the year with the highest number of conflicts, 61, to be exact, since the end of the Second World War[10]. This reality is clearly visible to all, for not only in 2024 but also throughout the past few years, we have witnessed a steady increase in the number of conflicts across the world.

Starting with Russia's invasion of Ukraine, this being the main conflict that has placed the greatest pressure on NATO and the European Union, it has forced both to take drastic decisions in matters of strategy[11] and defence spending[12]. Another major threat to global peace and stability is the current situation in the Middle East, with conflicts such as the war between Israel and Palestine or the recently ignited war between Iran and Israel[13].

Another notable factor of instability in the region is the strong presence of armed militias in countries such as Yemen, where the Houthis operate, attacking Western merchant and military vessels sailing along its coast, thereby disrupting global trade and

[10] *UCDP: Sharp increase in conflicts and wars*. (s/f). Www.Uu.Se. https://www.uu.se/en/news/2025/2025-06-11-ucdp-sharp-increase-in-conflicts-and-wars

[11] BBC NEWS, *How Sweden and Finland went from neutral to Nato*, 11 de julio de 2023. Disponible en: https://www.bbc.com/news/world-europe-61397478.

[12] Pereira, I. T., & Yilmaz, M. C. (2025, marzo 28). *How much do NATO members spend on defence as threat perceptions rise?* Euronews. https://www.euronews.com/my-europe/2025/03/28/how-much-do-nato-members-spend-on-defence-as-threat-perceptions-rise

[13] Emergui, S. (2025, junio 17). *Israel intensifica los golpes y aprovecha su superioridad ante Irn*. El Mundo. https://www.elmundo.es/internacional/2025/06/17/6851acbce4d4d8aa238b456e.html

naval movements of foreign armed forces[14]. This situation, combined with other conflicts such as the recent one between Pakistan and India[15] as well as rivalries whose growing tension could evolve into future armed conflicts, like those between North and South Korea or between Taiwan and China, paints a worrying picture. The West could easily find itself dragged into these disputes due to existing commitments and alliances, such as the mutual defence agreement between the United States and Taiwan, which generates constant friction with Beijing[16], and could eventually lead to a large-scale conflict in which Europe would also be directly involved.

This increasingly deteriorated international panorama has led Western countries, especially the European ones, to choose the path of rearmament. In the face of threats both at their doorstep and abroad, European nations have decided to awaken from the dormant state of low military investment in which they had been immersed since the end of the Cold War[17], and to take action. European countries, Spain among them, have collectively decided to significantly increase their military spending up to 2%, or even 5% of GDP[18], in order to prepare themselves to confront any situation in which they may be drawn or become involved in the not-so-distant future.

Summits such as NATO's meeting in Madrid in 2022 were key to reaffirming the need for increased defence spending and to establish shared objectives and common threats to address collectively[19]. In the following graph, one can observe how the unified defence expenditure of all EU countries has skyrocketed over the past three years, from €214

[14] AFP. (2025, marzo 23). *Ataques de los hutíes obligan a buques de EU a costosos desvíos alrededor de África*. El Economista. https://www.eleconomista.com.mx/internacionales/ataques-huties-obligan-buques-eu-costosos-desvios-alrededor-africa-20250323-751685.html

[15] THE NEW YORK TIMES, *¿Qué pasó entre India y Pakistán?*, 13 de mayo de 2025. Disponible en: https://www.nytimes.com/es/2025/05/13/espanol/mundo/india-pakistan-que-paso.html

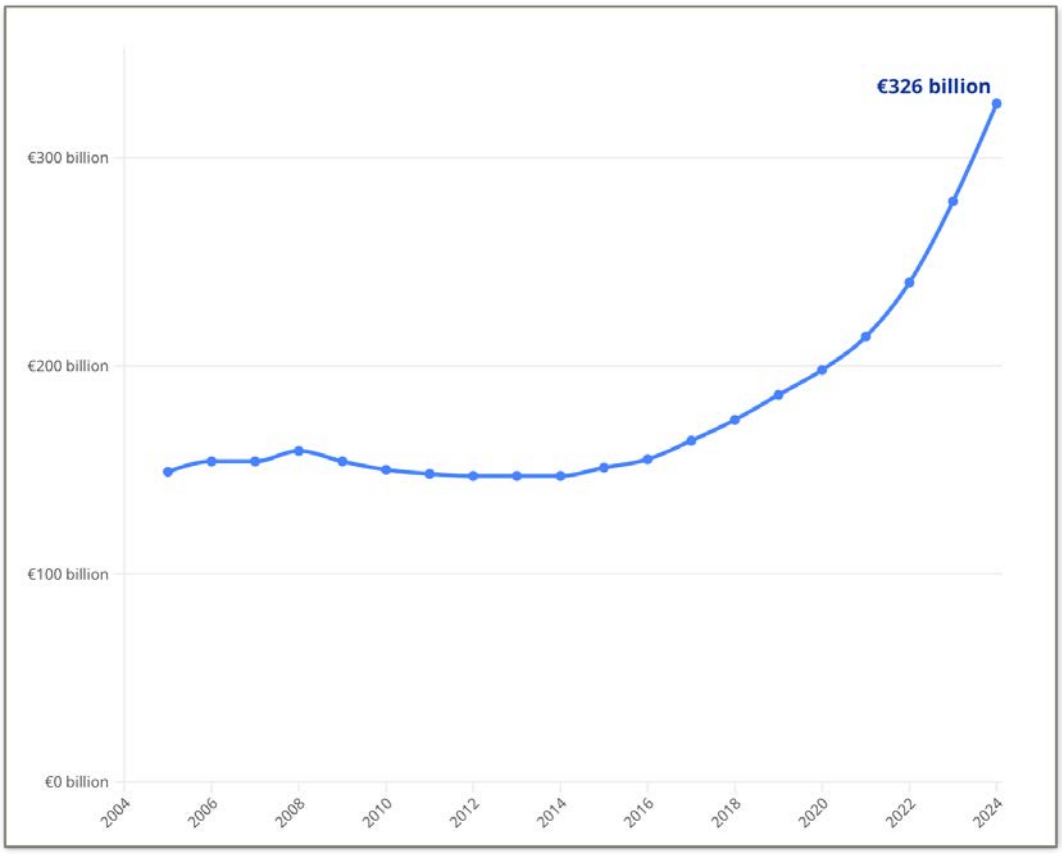
[16] Abierta, E. (2025, enero 10). Entre dragones y océanos: el rol estratégico de Taiwán. *Embajada Abierta*. https://www.embajadaabierta.org/post/entre-dragones-y-oceanos-el-rol-estrategico-de-taiwan

[17] Demasiados cañones y poca mantequilla - INDICO: Índice de Coherencia. (2023, junio 23). *INDICO: Índice de Coherencia -*. https://www.indicedecoherencia.org/noticias/demasiados-canones-y-poca-mantequilla/

[18] Blackburn, G. (2025, junio 6). *La mayoría de los miembros de la OTAN respalda la exigencia de Trump de elevar el gasto militar al 5% del PIB*. Euronews. https://es.euronews.com/my-europe/2025/06/06/la-mayoria-de-los-miembros-de-la-otan-respalda-la-exigencia-de-trump-de-elevar-el-gasto-mi

[19] *Conclusiones de la Cumbre de la OTAN celebrada en Madrid*. (s/f). CEOE. Recuperado el 21 de julio de 2025, de https://www.ceoe.es/es/ceoe-news/internacional/conclusiones-de-la-cumbre-de-la-otan-celebrada-en-madrid

billion in 2021 to €326 billion in 2024, a very significant 30%[20] increase that illustrates both the urgency of the situation and the budgetary complacency from which Europe is emerging.



Source: European Defence Agency . Imagen 1. Gasto en defensa europeo

In Spain's case, during the 2014 NATO Summit in Wales, under the leadership of Mariano Rajoy, the country committed to reaching the goal of dedicating 2% of its GDP to defence spending within ten years[21]. At that time, expenditure stood at 0.92% of GDP, one of its lowest levels[22]. In 2018, Prime Minister Pedro Sánchez reaffirmed this commitment at the

[20] COUNCIL OF THE EUROPEAN UNION, *EU defence in numbers*, actualizado el 27 de mayo de 2025. Disponible en: https://www.consilium.europa.eu/es/policies/defence-numbers/

[21] ABELLÁN, Lucía, *La OTAN prepara su fuerza de acción inmediata en el Este para fin de año*, El País, 6 de septiembre de 2014. Disponible en: https://advance-lexis-com.ezproxy.unav.es/api/document?collection=news&id=urn%3acontentItem%3a5D2X-2W61-F046-W2RV-00000-00&context=1519360&identityprofileid=W8TPCG58752

[22] *España - Gasto público Defensa*. (2025, febrero 5). Datosmacro.com. https://datosmacro.expansion.com/estado/gasto/defensa/espana

Brussels summit, stating that "this government assumes the roadmap set by previous administrations" and would work to achieve the 2% target by 2024[23].

According to the latest SIPRI report (April 2025), Spain is already very close to that threshold, thanks to a steady and sustained increase in military spending[24]. To accelerate progress toward the target, Sánchez's government announced two additional investment packages: one of €10.471 billion in April 2025 under the National Security and Defence Plan[25], and another of €15.6 billion, approved in June through extraordinary mechanisms without parliamentary approval[26]. With these reinforcements, the executive aims not only to meet but even to exceed the 2% of GDP benchmark, adapting the Armed Forces to the current geopolitical context and ensuring that the budgetary increase translates into real and sustainable capabilities.

Current Capabilities of the Spanish Defence Industry

The current landscape of Spain's national defence industry is extensive; it is made up of around 544 companies, according to the *Spain Defence & Security Industry 2025* yearbook published by InfoDefensa, based on data from the Ministry of Defence. This report states that these 544 companies operate across nearly 1,500 facilities in Spain. It also notes that, out of all of them, 376 declared sales in the defence sector in 2022. The yearbook estimates that the vast majority of this production comes from the Aeronautics sector, accounting for 60.4%, followed by the Naval sector with 14.7%, and the Land sector with 7.2%[27]. The *Defense Industrial Strategy Report 2023*, published by the

[23] Es, R. (2018, julio 12). *Pedro Sánchez asume el compromiso de Rajoy de llegar al 2% del PIB en defensa en 2024*. RTVE.es. https://www.rtve.es/noticias/20180712/cumbre-otan-pedro-sanchez-asume-compromiso-llegar-2-del-pib-defensa-2014/1763981.shtml

[24] STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE (SIPRI), *Gasto militar mundial alcanza un máximo histórico en 2023, impulsado por conflictos y tensiones*, comunicado de prensa, 22 de abril de 2024. Disponible en: https://www.sipri.org/sites/default/files/Milex%20Press%20Release%20ESP.pdf

[25] *Pedro Sánchez anuncia que España destinará ya este año el 2% del PIB a Seguridad y Defensa*. (s/f). Gob.es. Recuperado el 21 de julio de 2025, de https://www.lamoncloa.gob.es/presidente/actividades/paginas/2025/220425-sanchez-plan-seguridad-defensa.aspx

[26] Jorrín, J. G. (2025, junio 10). *El Gobierno eleva en otros 15.600 millones el presupuesto de Defensa sin pasar por el Congreso*. El Confidencial. https://www.elconfidencial.com/economia/2025-06-10/gobierno-eleva-15-600-millones-presupuesto-defensa-sin-pasar-por-el-congreso_4148674

[27] InfoDefensa, R. D. (s/f). *SPAIN Defence and Security Industry 2025 / Hacia la autonomía industrial europea.* Infodefensa - Noticias de defensa, industria, seguridad, armamento, ejércitos y tecnología de la defensa. Recuperado el 21 de julio de 2025, de https://www.infodefensa.com/file/view/53382

Ministry of Defence, along with the aforementioned yearbook, confirm these figures and place Airbus Defence and Space at the top of Spain's defence production, with a 51.6% share of the industry (around €4.997 billion) in 2022. Navantia follows with 10.6% and sales of approximately €1.025 billion. Indra Sistemas occupies third place with 5.4% and €522 million in sales. Closing the list of the most prominent companies are GDELS–Santa Bárbara Sistemas, which despite holding only 3% of the market, reaches €294 million in sales, and ITP Aero, with 2.6% and €257 million[28].

These five companies alone, out of the 544 that exist, already account for 73.2% of Spain's total production and sales of defence material. This indicates that any significant budgetary increase might become concentrated in a limited number of actors, greatly boosting their production capacity but also highlighting Spain's dependence on these major suppliers. The Ministry of Defence would first need to identify which sectors most urgently require increased funding, as some may need more capital than others—meaning that certain companies could rise in the ranking of defence sales depending on where the investment is directed.

Each of these five companies leads a strategic segment of defence, whether land, naval, or air, although their true ability to absorb an increase in defence demand and spending depends not only on their infrastructure but also on their networks of top-tier suppliers.

Airbus Defence & Space is undoubtedly the main national actor and one of the few capable of fully designing, manufacturing, and certifying military aircraft. From its facilities in Seville, Getafe, and Albacete, aircraft such as the Eurofighter fighter jet, the A400M and C-295/CN-235 transport aircraft, the A330 MRTT tanker, and helicopters such as the Tiger and the NH90 are assembled and produced. It also plays an active role in the development of the Eurodrone, Europe's next-generation tactical drone[29]. This positioning allows Spain to maintain significant autonomy in military aeronautics, although dependence on international consortia still conditions certain strategic programs[30].

[28] MINISTERIO DE DEFENSA (España), *Estrategia Industrial de Defensa 2023*, aprobado mediante Resolución 300/09365/23 (Boletín Oficial de Defensa, 7 de junio de 2023). [Informe PDF]. Disponible en: https://publicaciones.defensa.gob.es/media/downloadable/files/links/e/s/estrategia_industrial_de_defensa_2023.pdf

[29] de Antonio, J. (2024, abril 25). *Airbus, Indra y Navantia lideran el sector de defensa español*. La Razón. https://www.larazon.es/economia/airbus-indra-navantia-lideran-sector-defensa-espanol_20240425662a3436c18d400001865983.html

[30] de Antonio, J. (2024, abril 25). *Airbus, Indra y Navantia lideran el sector de defensa español*. La Razón.

Navantia, the state-owned shipbuilder, leads naval defence production. It has been responsible for designing and constructing advanced vessels such as the F-110 frigates (with an estimated investment of €4.3 billion) and the S-80 submarines (whose cost is around €4 billion)[31]. It also manufactures patrol boats, corvettes, and logistical ships, and internally integrates its own systems. SCOMBA, the integrated combat system developed by Navantia, links all the ship's sensors, weapons, and command-and-control systems to manage tactical operations in real time[32].

Indra, a multinational technology company, is Spain's leading reference in electronic defence and integrated systems. Its portfolio includes 3D radars, C4ISR systems, military simulators, cyber-defence, drones (UAVs), and anti-missile capabilities deployable on naval, air, land, and space platforms[33]. Among the UAV systems it integrates are the Valero tactical drone[34], the Pelícano unmanned helicopter[35], and the Crow anti-drone solution[36]. Indra positions itself as a critical technological pillar in European programs, including the FCAS, where it holds a strategic 28% share, reinforcing Spain's industrial and technological integration in Europe[37].

Santa Bárbara Sistemas, a subsidiary of the American company General Dynamics, leads the land sector. It produces armoured vehicles such as the Leopard 2E, turrets,

https://www.larazon.es/economia/airbus-indra-navantia-lideran-sector-defensa-espanol_20240425662a3436c18d400001865983.html

[31] Valls, F. H. (2025, marzo 16). *Seis empresas se disputan el gasto en defensa: 4.000 millones más cada año*. La Vanguardia. https://www.lavanguardia.com/economia/20250316/10484065/seis-empresas-disputan-gasto-defensa-4-000-millones-mas-ano.html

[32] NAVANTIA, *SCOMBA/CATIZ*, 2025. [Sistema de combate naval]. Disponible en: https://www.navantia.es/es/producto/scomba-catiz/?utm_source=chatgpt.com

[33] INDRA, *Defence Systems*, https://www.indracompany.com/es/defence-systems

[34] Scaliter, J. (2025, mayo 10). *Así es Valero, el nuevo dron completamente español al que Indra ha definido como camaleónico*. La Razón. https://www.larazon.es/tecnologia/asi-valero-nuevo-dron-completamente-espanol-que-indra-definido-como-camaleonico_20250510681f371c57a5aa2cde1f74ef.html

[35] INDRA, *Pelicano: RPAS de despegue y aterrizaje vertical automático*, 2020. [Documento técnico en PDF]. Disponible en: https://www.indracompany.com/sites/default/files/indra_pelicano_rpas_despegue_y_aterrizaje_vertical_automatico_es_2020.pdf(consultado el 19/06/2025).

[36] INDRA, *Indra Air Drones*, 2019. Disponible en: https://www.indracompany.com/es/indra-air-drones

[37] Valls, F. H. (2025, marzo 16). *Seis empresas se disputan el gasto en defensa: 4.000 millones más cada año*. La Vanguardia.https://www.lavanguardia.com/economia/20250316/10484065/seis-empresas-disputan-gasto-defensa-4-000-millones-mas-ano.html

cannons, rocket launchers, as well as special and amphibious vehicles[38]. Its catalog also includes infantry weapons (grenade launchers, automatic rifles) and their corresponding ammunition[39]. It is currently involved in manufacturing the new 8×8 Dragón vehicle through the Tess Defence consortium, with a budget exceeding €2.5 billion[40].

ITP Aero, finally, is Spain's leading manufacturer of military propulsion engines and participates as a partner in major international aerospace propulsion consortia: Eurojet (EJ200 engine for the Eurofighter)[41], Europrop International (TP400 engine for the A400M), and MTRI (engine for the Tiger helicopter)[42]. It has also been selected as a key partner in developing the engine for the future FCAS fighter jet, strengthening its position as one of the technological pillars of Spain's military aerospace sector[43].

The health and growth capacity of these major companies depend not only on their plants and innovation centers but also on their network of top-tier suppliers who deliver critical components and strategic technology, conditioning Spain's industrial autonomy in periods of high demand.

For example, Airbus Defence & Space collaborates with the Spanish company AERTEC, which has been selected as a supplier of manufacturing engineering services in its plants in Spain and Germany. Its work focuses on process industrialisation, systems engineering, and tooling development, incorporating digital solutions and automation[44]. Airbus also works with Aciturri, a company specialized in aerostructures and engine

[38] de Antonio, J. (2024, abril 25). *Airbus, Indra y Navantia lideran el sector de defensa español*. La Razón. https://www.larazon.es/economia/airbus-indra-navantia-lideran-sector-defensa-espanol_20240425662a3436c18d400001865983.html

[39] (S/f-b). Wikipedia.org. https://es.wikipedia.org/wiki/Santa_Bárbara_Sistemas

[40] Carrasco, B. (2023, abril 21). *Defensa inyectará otros 420 millones de euros en el VCR 8x8 Dragón del Ejército*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/4260328/defensa-inyectara-otros-420-millones-euros-vcr-8x8-dragon-ejercito

[41] *ITP Aero jugará un papel clave en el contrato de EUROJET para suministrar 59 motores EJ200 al Ejército del Aire y del Espacio de España*. (2024, diciembre 20). Itpaero.com. https://www.itpaero.com/itp-aero-jugara-un-papel-clave-en-el-contrato-de-eurojet-para-suministrar-59-motores-ej200-al-ejercito-del-aire-y-del-espacio-de-espana/

[42] *Defensa – Fabricante de motores aeronáuticos y turbinas*. (s/f). Itpaero.com. https://www.itpaero.com/es/defence/

[43] Vadillo, J. (2022, diciembre 2). *ITP Aero firma su entrada en el programa del caza europeo FCAS*. Ediciones EL PAÍS S.L. https://cincodias.elpais.com/cincodias/2022/12/02/companias/1669979930_159094.html

[44] AERTEC. (2025, febrero 7). *AERTEC refuerza su alianza con Airbus Defence*. Aertec. https://aertecsolutions.com/noticias/aertec-seleccionada-de-nuevo-por-airbus-defence-and-space-como-proveedor-de-servicios-de-ingenieria-en-espana-y-alemania/

components, which supplies key parts for various aerospace programs[45], including the A400M military transport aircraft[46].

Navantia, in its advanced naval production, collaborates with suppliers such as GMV, a Spanish company that develops advanced technological solutions for defence and security. GMV provides tactical navigation systems, such as the *Senda* family, which are designed for integration into naval platforms, including the F-100 frigates and the future F-110 class. These systems stand out for their resistance to interference and their anti-jamming capabilities, ensuring operational autonomy in complex environments[47]. GMV, through its technologies, thus helps strengthen the technological sovereignty and operational resilience of Navantia's naval programs. Meanwhile, Thales, a French company, manufactures in Spain the Tuum-6 underwater communication system, an essential component of the acoustic suite that equips the F-110 frigates[48].

Indra also maintains strategic alliances with European companies, such as the Belgian firm Intersoft Electronics, with which it collaborates in the development and deployment of anti-drone solutions and military radars. Both companies seek to combine their technological capabilities to strengthen their position in the European air-defence market, in a joint commitment to local production and direct support for the continent's armed forces[49].

Santa Bárbara Sistemas, as the Spanish subsidiary of General Dynamics, receives cutting-edge technology from the latter for the manufacture of vehicles such as the Piraña 8×8 used by the Spanish Army. Moreover, the technology provided by GDELS to Santa

[45] **ACITURRI AERONÁUTICA**, *Aciturri Aeronáutica*, Asociación TEDAE (asociado), publicada hace x aproximadamente 1,4 años. Disponible en: https://tedae.org/asociado/aciturri-aeronautica/

[46] **ACITURRI AEROSTRUCTURES**, *Programs*, 2025. Disponible en: https://www.aciturri.com/en/aerostructures/programs

[47] InfoDefensa, R. D. (2025, mayo 16). *GMV expone en Feindef los sistemas de navegación táctica para las fragatas F-100 y el VCR 8x8*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5290412/gmv-refuerza-feindef-soberania-espanola-navegacion-militar-sistemas-senda-isnav-nerva

[48] InfoDefensa, R. D. (2021, junio 16). *Thales producirá en España el sistema de comunicación submarino de las fragatas F-110*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/3123141/thales-producira-espana-sistema-comunicacion-submarino-fragatas-f-110

[49] Romera, J. (2025, junio 16). *Indra se alía en defensa con la empresa belga Intersoft y confirma el interés por Iveco Defence*. ElEconomista. https://www.eleconomista.es/industria/noticias/13418364

Bárbara has also enabled it to develop the Dragón 8×8 vehicle for the Spanish Army[50]. Thus, GDELS can be regarded as a valuable technology supplier for SBS, and for Spain as a whole.

Finally, ITP Aero receives technology and collaborates with companies such as Rolls-Royce, for example in the development of engines like the *Wingman*, designed for future large unmanned aircraft. Both companies work together to develop what they describe as "a cutting-edge and efficient propulsion solution" for ITP Aero's drones[51].

Despite the budgetary effort planned for 2025, the Spanish Armed Forces continue to exhibit serious operational limitations. According to analysts and military personnel, Spain still lacks a sufficient strategic reserve of ammunition, even for a low-intensity conflict, and does not possess key capabilities such as its own ballistic missiles, high-coverage anti-missile systems, or an adequate drone fleet. These shortcomings demonstrate that the national industrial capacity is still unable to sustain a prolonged conflict without resorting to international suppliers, reinforcing the need for strategic planning and investment prioritisation[52].

This lack of self-sufficiency is also evident in the industrial sphere: many components, from guided missiles[53] to military microchips[54], still depend on third countries such as the United States. Experts argue that there is still no national production capable of sustaining the level of demand that a prolonged conflict would require, noting that "there are many capabilities we still lack"[55].

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[50] defensa.com. (2025, marzo 18). *Comunicado de Santa Brbara en medio de la polmica con Indra*. Defensa.com. https://www.defensa.com/industria/gdels-santa-barbara-sistemas-pone-puntos-sobre-i

[51] *Rolls-Royce Deutschland e ITP Aero unen sus fuerzas para crear un motor Wingman para futuros aviones no-tripulados de gran tamaño*. (2024, junio 5). Itpaero.com. https://www.itpaero.com/rolls-royce-deutschland-e-itp-aero-unen-sus-fuerzas-para-crear-un-motor-wingman-para-futuros-aviones-no-tripulados-de-gran-tamano/

[52] Trelles, G. (2025a, marzo 13). *Desde misiles balísticos hasta muchos "drones baratos", las armas que precisa España: "No tenemos munición ni para una guerra pequeña"*. infobae. https://www.infobae.com/espana/2025/03/13/desde-misiles-balisticos-hasta-muchos-drones-baratos-las-armas-que-precisa-espana-no-tenemos-municion-ni-para-una-guerra-pequena/

[53] Mata, A. (2023, noviembre 16). España se prepara para aumentar su arsenal de armamento estadounidense por un valor de 16.900 millones de euros. Newtral. https://www.newtral.es/espana-aumentar-arsenal-armamento-estadounidense-millones-de-euros/20231116/

[54] Vicente, J., & Ruiz, M. P. (2025, abril 22). *España y Europa pueden armarse sin Estados Unidos: el 80% del nuevo gasto militar se queda en casa*. laSexta. https://www.lasexta.com/programas/lasexta-clave/espana-europa-pueden-armarse-estados-unidos-80-nuevo-gasto-militar-queda-casa_202504226807edf0ea4dfb0001c55c73.html

[55] Trelles, G. (2025a, marzo 13). *Desde misiles balísticos hasta muchos "drones baratos", las armas que precisa*

The Industrial and Technological Plan for Security and Defence, presented by the Government earlier this year, appears to acknowledge these shortcomings and allocates €10.471 billion to addressing part of them. Of this amount, €1.962.98 billion will be devoted to "defence and deterrence instruments," primarily focused on updating obsolete systems and acquiring new ones. Among the main investments are the acquisition of a wheeled self-propelled artillery system to replace the Army's M-109 A5 (€300 million), the development of new tracked vehicles to replace the TOA (€200 million), and the modernisation of the "Álvaro de Bazán" frigates (€225 million)[56]. Furthermore, the plan includes the replacement of the logistical support ship BAC *Patiño* (€100 million), the development of a new tracked combat vehicle similar to the *Pizarro* (€60 million), and the creation of an embarked anti-missile launcher system (€70 million). It also allocates €564.98 million for the establishment of a strategic reserve of ammunition and explosives in accordance with NATO standards, aiming to address one of Spain's most critical shortcomings[57].

Moreover, this summer it was revealed that the Navy intends to acquire a new conventional aircraft carrier, with the capacity to operate 30 next-generation aircraft, as well as a new amphibious carrier similar to the *Juan Carlos I* [58]. According to EFE, Navantia would be responsible for developing this project alongside the Navy, representing a significant challenge for the national maritime industry. The fact that the Navy is prioritising the development of two new aircraft carriers highlights the current shortfall that existed in this sector and the need for the Navy to expand its fleet in order to carry out its maritime functions with greater effectiveness.

At this point, I had the opportunity to speak with Brigadier General (ret.) Salvador Sánchez Tapia, who offered a critical perspective on the challenges Spain faces in the field of

España: "No tenemos munición ni para una guerra pequeña". infobae. https://www.infobae.com/espana/2025/03/13/desde-misiles-balisticos-hasta-muchos-drones-baratos-las-armas-que-precisa-espana-no-tenemos-municion-ni-para-una-guerra-pequena/

[56] Gobierno de España. (2025). *Plan Industrial y Tecnológico para la Seguridad y la Defensa*. https://www.lamoncloa.gob.es/consejodeministros/resumenes/Documents/2025/230425-plan-industrial-y-tecnologico-para-la-seguridad-y-la-defensa.pdf

[57] Gobierno de España. (2025). *Plan Industrial y Tecnológico para la Seguridad y la Defensa*. https://www.lamoncloa.gob.es/consejodeministros/resumenes/Documents/2025/230425-plan-industrial-y-tecnologico-para-la-seguridad-y-la-defensa.pdf

[58] Mayo, B. (2025, junio 25). La Armada española trabaja ya en un portaviones capaz de operar 30 aviones de última generación. Agencia EFE. https://efe.com/espana/2025-06-25/portaaviones-armada-espanola-ejercito/

defence. He emphasised that the country continues to suffer from significant shortcomings: from the lack of ammunition and air-defence systems to the absence of long-range artillery, armed drones, and space-related capabilities. He also noted that platforms such as the Leopard 2E are beginning to become obsolete when compared to the new generation of European tanks.

The General also stressed the shortage of qualified personnel, warning that it is not enough to acquire new submarines if there are no crews available to operate them. He added the need for Spain to have its own tactical and strategic communications systems, an essential requirement for ensuring operational autonomy.

In his assessment, Spain should open new production lines and anticipate in advance the time the industry needs to grow, automate, and train personnel. However, he acknowledged that in the short term it will be inevitable to diversify acquisition sources, combining national production with purchases abroad. Although he defended the European priority, he recalled that certain systems, such as the vertical take-off F-35, remain exclusive to the United States and cannot be replaced in the short term.

In short, Sánchez Tapia warns that rearmament cannot be limited to a matter of spending or isolated acquisitions: it requires industrial planning, investment in personnel, and strategic clarity. Otherwise, Spain risks ending up with incomplete Armed Forces, unable to sustain over time the capabilities they aim to deploy[59].

Potential Increase in Production

It is clear that, once the 2025 General State Budget (*PGE 2025*) is approved, the budgetary side would, in theory, be covered and secured. Therefore, attention must shift beyond the economic dimension toward the capabilities of both the Spanish and European defence industries, in order to draw conclusions about whether they could scale up production at a steady pace. As previously noted, defence spending is close to reaching 2% of GDP, supported by the two investment packages announced by the Prime Minister, one of €10.471 billion[60] and another of €15.600 billion[61]. This would be added

[59] Sánchez Tapia, S. (2025, junio). Entrevista personal con el autor.

[60] Pia, R. (2025, abril 22). Snchez anuncia 10.471 millones extras en defensa y seguridad para llegar al 2% del PIB este ao tras la presin de la OTAN. El Mundo. https://www.elmundo.es/espana/2025/04/22/68075457e9cf4a6a2c8b4597.html

[61] Jorrín, J. G. (2025, junio 10). *El Gobierno eleva en otros 15.600 millones el presupuesto de Defensa sin pasar por el Congreso*. El Confidencial. https://www.elconfidencial.com/economia/2025-06-10/gobierno-eleva-15-600-millones-

to the €22.6099 billion[62] already invested under the 2023 budget, bringing total defence spending to approximately €48.680 billion. With this amount, Spain has for the first time in decades the resources necessary to undertake a structural rearmament, but this does not necessarily mean that the country is prepared to implement it effectively.

A large part of this investment will be channeled mainly through the so-called Special Modernisation Programs (*PEM*), of which more than 30 new ones have already been approved[63]. These programs cover a wide range of capabilities: from tracked combat vehicles to replace the old TOA (€200 million) and self-propelled artillery systems (€300 million), to the modernisation of the F-100 frigates (€225 million) and the construction of a new logistical support ship (BAC) (€100 million), a hydrographic vessel (€60 million), and a new electronic-warfare ship (€105 million). They also include bridge-layer vehicles (€116 million), reconnaissance drones (€3 million), an embarked anti-air launcher system (€70 million), a new advanced jet trainer for pilots (€275 million), two new SAR satellites (€200 million), and improvements in cybersecurity and tactical communications[64]. At the naval level, the progress of the F-110 frigate program stands out, with its execution even ahead of schedule, as Navantia works at a high pace and in close coordination with the Navy[65].

However, not all projects are progressing at the same pace. The case of the 8×8 Dragón armoured vehicle, one of the most emblematic programs, has accumulated years of delays and delivery difficulties. The dispute between Indra and General Dynamics (Santa Bárbara Sistemas) over the industrial management of the project has revealed a structural weakness in Spain's land-defence industry: a lack of cohesion, limited capacity to scale up production, and dependence on foreign suppliers[66]. The S-80 submarine, for

presupuesto-defensa-sin-pasar-por-el-congreso_4148674/

[62] *España - Gasto público Defensa*. (2025, febrero 5). Datosmacro.com. https://datosmacro.expansion.com/estado/gasto/defensa/espana

[63] InfoDefensa, R. D. (2025, julio 1). *El Gobierno aprueba 16 nuevos techos de gasto que garantizan la financiación plurianual de los nuevos PEM*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5350922/gobierno-aprueba-16-nuevos-techos-gasto-garantizan-financiacion-plurianual-nuevos-pem

[64] Gobierno de España. (2025). *Plan Industrial y Tecnológico para la Seguridad y la Defensa*. https://www.lamoncloa.gob.es/consejodeministros/resumenes/Documents/2025/230425-plan-industrial-y-tecnologico-para-la-seguridad-y-la-defensa.pdf

[65] *NAVANTIA: Three F110 frigates now under construction in Spain*. (2025, abril 28). Naval News. https://www.navalnews.com/naval-news/2025/04/navantia-three-f110-frigates-now-under-construction-in-spain/

[66] Rodríguez, A. (2024, diciembre 16). *Dimite el jefe del programa 8x8 "Dragón" en Defensa al ver que no llegan los*

its part, also suffered cost overruns and delays, although the schedule has stabilised following a new agreement with Navantia in 2024[67]. In contrast, the F-110 program demonstrates that when consolidated experience and industrial coordination are present, the national industry can perform effectively.

Regarding the new aircraft carrier requested by the Navy, which has not yet received budgetary approval, it could materialise sometime between 2035 and 2040. Although it would represent a significant challenge, it could accommodate up to 40 aircraft and reach a displacement of 40,000 tons[68]. The technical feasibility exists, as Navantia has already built the *Juan Carlos I* and is behind the F-110 program; however, the main obstacles are the cost, the timeline (more than a decade of development), and the absence of annual budgets allocating the necessary funding to begin its development as soon as possible.

Having reviewed everything that is expected to be acquired or built, the key question is whether the national industry is truly in a position to absorb these funds and translate them into operational capabilities within reasonable timeframes. Spain does indeed have several leading companies; Navantia, Indra, Airbus, Santa Bárbara, among others, but the industrial ecosystem faces three notable structural limitations: scale, speed, and technological autonomy.

In terms of scale, experts and officials agree that the Spanish military industry is significant but much smaller than that of its neighbours, which limits its ability to respond to sudden increases in demand. As Rear Admiral José Antonio Toro, Deputy Director of Defence Industry at the Ministry of Defence, notes, "compared to our competitors, the Spanish defence industry is smaller and more fragmented" (Rodríguez, 2025)[69]. Based on absolute figures, Spain's average annual defence demand is only a fraction of that of

blindados. The Objective. https://theobjective.com/espana/politica/2024-12-16/dimite-8x8-dragon-defensa-blindados

[67] Carrasco, B. (2024, noviembre 19). *Defensa y Navantia acuerdan un nuevo calendario para el S-80: el segundo submarino llegará en otoño de 2026*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5076459/defensa-navantia-acuerdan-nuevo-calendario-programa-s-80-segundo-submarino-llegara-otono-2026

[68] Soriano, G. (2025, junio 25). *Navantia ya trabaja en el estudio de viabilidad de un portaaviones puro para la Armada al que acompañarán otros dos tipo LHD*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5343474/navantia-trabaja-estudio-viabilidad-portaaviones-puro-par-armada-acompanaran-otros-tipo-lhd

[69] Rodriguez, O. C. (2025, enero 16). Escribano, primer accionista de Indra tras la SEPI, alienta una mayor concentración de la industria de la defensa en España. Economía Digital. https://www.economiadigital.es/empresas/escribano-concentracion-espana.html

the major European powers, approximately half of Italy's, one quarter of Germany's, and one sixth of that of France or the United Kingdom[70]. This gap helps explain why national firms lack the experience in the mass production of hundreds upon hundreds of units (and fast-track deliveries) that characterises the major foreign defence companies.

We can see that, in contrast with Spain, Europe's leading companies manufacture weaponry on a much larger scale for their own armed forces and for export to third countries. For example, the French company Dassault Aviation, specialised in fighter aircraft, delivered 21 Rafale jets in 2024 alone (14 to France and 7 to foreign customers), and by the end of 2024 its order book totaled 220 Rafales (164 for export)[71]. Dassault has spent decades producing dozens of fighter jets each year, with guaranteed orders for the coming decades, unlike any Spanish manufacturer. Another French company, Naval Group, which builds frigates, submarines, and corvettes, reached revenues of €4.4 billion in 2024 (a 2% increase compared to 2023). That year, it launched the Brazilian submarine *Tonelero*, delivered the second corvette for the United Arab Emirates, and the French submarine *Tourville*(Barracuda #3). In total, Naval Group's order book stood at €18.2 billion at the end of 2024, a volume capable of sustaining continuous production of warships[72].

The German company Rheinmetall, a multinational specialising in armoured vehicles and munitions, recorded revenues of €9.751 billion in 2024 (+36% year-on-year), of which nearly 80% came from defence. Its order book exceeded €55 billion, a record figure, with massive orders for armoured vehicles, ammunition, and systems. For example, its vehicle division closed 2024 with €3.790 billion in sales (45% more than in 2023), reflecting projects such as the expansion of Leopard tank production and other armoured vehicles on assembly lines. In addition, Rheinmetall is investing billions to increase its workforce

[70] Navarro, E. (2024, febrero 26). *La industria española de Defensa en el siglo XXI (y2)*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/4736681/industria-espanola-defensa-siglo-xxi-y2

[71] *Deliveries, order intakes and backlog in number of new aircraft as of December 31, 2024*. (2013, abril 26). Dassault Aviation, a Major Player to Aeronautics; Dassault Aviation. https://www.dassault-aviation.com/en/group/press/press-kits/deliveries-order-intakes-and-backlog-in-number-of-new-aircraft-as-of-december-31-2024/

[72] Naval Group. (2024). *Annual Report*. https://www.naval-group.com/sites/default/files/2025-04/Annual%20report%20Naval%20Group%202024%20EN_0.pdf#:~:text=REVENUE%20The%20group's%20revenue%20for,bill%20ratio%20was%201.88

and production facilities (almost €8 billion over two years) in order to sustain these production levels[73].

Lastly, the Italian company Leonardo, an aerospace and defence conglomerate, closed 2024 with revenues of €17.8 billion and new orders totalling €20.9 billion. In 2024, it grew by 11% compared to 2023[74]. With divisions dedicated to helicopters, aviation, electronics, and defence systems, Leonardo operates multiple production plants for rotors, fuselages, radars, and more, supplying both the Italian armed forces and foreign militaries. These examples show that France, Germany, and Italy possess industrial giants capable of manufacturing dozens or even hundreds of systems per year, aircraft, ships, tanks, or munitions, both for their domestic markets and for export.

By contrast, the main Spanish firms in the sector handle much smaller annual volumes. For example, Indra reached revenues of around €4.843 billion in 2024, a 12% increase compared to 2023. However, most of its sales, 62%, come from its technology subsidiary, Minsait, which the company is already planning to sell in order to increase investment in Indra's defence activities[75]. Therefore, its defence equipment business represents only a single-digit percentage of its total revenues, and consequently, of its production. Indra is now reinforcing its manufacturing capacity to meet the rising demand in defence; as its executives note, "the pillar for growth" is to increase industrial capacity through new industrialisation plans, supplier rationalisation, and the expansion of production lines[76]. One example of this reinforcement is the radar factory that Indra opened last year, the largest in Spain and one of the largest in Europe[77].

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[73] *Financial figures FY 2024 – New all-time records*. (s/f). Rheinmetall. Recuperado el 14 de julio de 2025, de https://www.rheinmetall.com/en/media/news-watch/news/2025/03/2025-03-12-rheinmetall-financial-figures-fical-year-2024

[74] p. A., L. S. (2025, febrero 20). *Leonardo: Board of Directors reviewed 2024 preliminary results*. Leonardo.com; Leonardo S.p.A. https://www.leonardo.com/en/press-release-detail/-/detail/20-02-2025-leonardos-fy2024-financial-preliminary-results

[75]https://www.elconfidencial.com/empresas/2025-02-26/indra-gana-278-millones-en-2024-un-35-mas-impulsado-por-su-negocio-de-defensa_4074091/#:~:text=Aunque sus ingresos siguen dependiendo,será para invertir en esta

[76] Carrasco, B. (2025, marzo 1). *El plan de Indra en Defensa: del aumento de la producción a los vehículos militares y la munición merodeadora*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5198375/plan-indra-defensa-aumento-produccion-nuevas-tecnologias-como-municion-merodeadora

[77] TEDAE. (2020, enero 23). *Indra inaugura la mayor fábrica de radares de España y una de las mayores de Europa*. TEDAE. https://tedae.org/defensa/indra-inaugura-la-mayor-fabrica-de-radares-de-espana-y-una-de-las-mayores-de-europa/

On the other hand, Navantia recorded revenues of €1.528 billion in 2024, representing a 6.6% increase, driven mainly by the construction of F-110 frigates, S-80 submarines, and Avante SA corvettes. However, this accounts for only one third of its total revenues, since maintenance services and its green-energy division make up more than 50% of its income[78]. This means that, for the time being, Navantia builds only a few vessels per year, especially when compared to the French programs of the Naval Group. However, it is worth highlighting the efforts Navantia is making to increase its production capacity: in 2024 it hired more than 700 people and invested 10% of its revenues in R&D&I, and a few months ago it acquired new shipyards in the United Kingdom in order to meet the growing foreign production demands[79].

According to the Government, although 89% of the plan's funds will be invested in Spain [80], this does not guarantee that the entire supplier chain will be ready to respond quickly, something that conditions the effectiveness of rearmament in the short term. With limited national demand and a relatively small, though growing, market, it becomes clear that major Spanish companies are not accustomed to manufacturing weapons systems at large scale or within very short timeframes, and this will pose a challenge for the country as a whole.

In terms of speed, there are some worrying precedents. The 8×8 Dragón Combat Vehicle program, as mentioned earlier, has accumulated years of delays. In February 2025, the Secretary of State for Defence warned that the manufacturing consortium, Tess Defence, had not met the deadlines and acknowledged that "the delivery of vehicles currently in production has been delayed," pushing the entire schedule back to 2025[81]. In fact, the first 92 units promised for December 2024 were only barely completed in April 2025,

[78] *NAVANTIA incrementa su cifra de negocio un 6,6% en 2024 y refuerza su apuesta por la innovación tecnológica*. (s/f). SEPI. Recuperado el 14 de julio de 2025, de https://www.sepi.es/es/sala-de-prensa/noticias/navantia-incrementa-su-cifra-de-negocio-un-66-en-2024-y-refuerza-su-apuesta

[79] Rodríguez, J. (2025, enero 28). *Navantia consuma su plan y compra el astillero inglés que construyó el "Titanic"*. La voz de Cádiz. https://www.lavozdigital.es/provincia/navantia-consuma-plan-compra-astillero-ingles-construyo-20250128084934-ntv.html

[80] Grande, R. G. (2025, abril 23). *Tanques, obuses y munición: el Gobierno destinará casi dos mil millones a "instrumentos de defensa y disuasión"*. RTVE.es. https://www.rtve.es/noticias/20250423/tanques-obuses-municion-gobierno-destinara-casi-dos-mil-millones-instrumentos-defensa-disuasion/16551216.shtml

[81] Newsroom. (2025, febrero 20). *Defensa reprende a Tess Defence por el 8x8 pero elude confirmar si le multará por los retrasos en las entregas*. infobae. https://www.infobae.com/america/agencias/2025/02/20/defensa-reprende-a-tess-defence-por-el-8x8-pero-elude-confirmar-si-le-multara-por-los-retrasos-en-las-entregas/

almost five years after the contract was signed in 2020. These delays have forced the Ministry to continuously reschedule the deliveries and even to consider financial penalties for non-compliance[82].

The execution of the modernisation budget has also been deficient. According to the General Comptroller of the State Administration, the Ministry of Defence left approximately €1.051 billion unspent in 2024, meaning it executed barely 93% of its recognised obligations[83]. This budget under-execution may reflect administrative obstacles in the management of funds, which could hinder an effective rearmament process. On the other hand, the recently approved Special Modernisation Programs (PEM) entail major long-term commitments, since all of these projects have an expected duration of at least five years (until 2030 or beyond)[84], so that even if the contracts are signed soon, the first tangible results will not appear for several years, and in practice this means that many of those units or operational systems will take time to materialise.

In contrast, the naval industry has demonstrated a higher delivery pace, although operating at the limits of its capacity. Navantia is progressing at a seemingly solid rhythm with the Navy's major programs; among them, the F-110 frigate program stands out, advancing as planned. Construction of the third frigate, F113 *Menéndez de Avilés*, began three months ahead of the original schedule, and the keel of the second frigate, F112 *Roger de Lauria*, was laid seven months earlier than stipulated in the contract[85]. The company noted in April that the first three F-110 frigates were already under simultaneous construction and progressing at a good pace[86]. Moreover, Navantia recently launched

[82] González, M. (2024, diciembre 19). *Defensa impondrá una sanción multimillonaria por el retraso del nuevo blindado del Ejército de Tierra*. Ediciones EL PAÍS S.L. https://elpais.com/economia/2024-12-19/defensa-impondra-una-sancion-multimillonaria-por-el-retraso-del-nuevo-blindado-del-ejercito-de-tierra.html

[83] Dolz, C. (2025, abril 8). *El Gobierno no logra agotar el presupuesto en defensa: dejó 1.000 M sin ejecutar en 2024*. El Confidencial. https://www.elconfidencial.com/economia/2025-04-08/gobierno-deja-sin-ejecutar-1-000-millones-defensa-2024_4103969/

[84] de Santos, Á. L. (2025, junio 11). *El Gobierno da luz verde a 12 programas para modernizar las Fuerzas Armadas valorados en 15.635 millones*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5325934/gobierno-da-luz-verde-destinar-15635-millones-hasta-2037-modernizar-fuerzas-armadas

[85] *Navantia está construyendo en simultánea tres fragatas F110 para la Armada Española*. (s/f). Webinfomil.com. Recuperado el 15 de julio de 2025, de https://www.webinfomil.com/2025/04/navantia-esta-construyendo-en.html

[86] *Navantia avanza en el programa de fragatas F-110: Los tres primeros buques de la serie están ya en construcción en Ferrol*. (s/f). Navantia. Recuperado el 15 de julio de 2025, de https://www.navantia.es/es/actualidad/notas-prensa/navantia-avanza-en-el-programa-de-fragatas-f-110-los-tres-primeros-buques-de-la-serie-estan-ya-en-construccion-en-ferrol/

the F111 *Bonifaz*, highlighting its production speed and shifting the focus to the four remaining units, which are expected to arrive before 2030[87]. In addition, the second S-80 submarine, Narciso Monturiol, is close to being launched, after its schedule had to be adjusted due to a series of delays, and it is now expected to enter the water in 2026[88].

Navantia must now face multiple orders simultaneously, since in addition to the F-110 and the S-80 programs, the execution order for the new 650-million-euro Combat Supply Ship (BAC) has already been signed. Moreover, the modernisation of the two amphibious ships is planned, along with the construction of the new electronic-warfare vessel. This exceptional workload could place the company at the very limits of its production capacity[89].

In summary, this information suggests that Spain's military modernisation continues to suffer from significant delays: land programs such as the Dragón have accumulated years of postponements, budget execution is lagging, and the new contracts are only just beginning, while the Navy is progressing successfully, but with its naval industry already operating at a very high level of output.

Lastly, regarding technological autonomy, Spain remains dependent on foreign countries for key components such as semiconductors, missile systems, and projectiles. Spain, like all of Europe, lacks chip manufacturing plants, and efforts to attract such production facilities have so far been unsuccessful. As a result, the defence industry depends on foreign imports for the electronic core of its systems: radars, guidance systems, military communications, and so on. And although there is political will among EU member states, and there are already some emerging elements of this ecosystem in regions such as

[87] El País. (2025, 11 de septiembre). *España lanza a la mar una de las fragatas de combate más avanzadas del mundo, la F111 'Bonifaz' de Navantia*. *El País*. Recuperado el 15 de julio de 2025, de https://elpais.com/economia/2025-09-11/espana-lanza-a-la-mar-una-de-las-fragatas-de-combate-mas-avanzadas-del-mundo-la-f111-bonifaz-de-navantia.html

[88] Trelles, G. (2025, mayo 16). *Navantia pondrá a flote el segundo submarino S-80 antes del verano y botará la primera fragata F-110 en septiembre*. infobae. https://www.infobae.com/espana/2025/05/16/navantia-pondra-a-flote-el-segundo-submarino-s-80-antes-del-verano-y-botara-la-primera-fragata-f-110-en-septiembre/

[89] InfoDefensa, R. D. (2025a, abril 25). *Navantia se posiciona ante el nuevo plan en Defensa: "Estamos preparados para dar respuesta a las necesidades"*. Revista Defensa InfoDefensa. https://www.infodefensa.com/texto-diario/mostrar/5267320/navantia-posiciona-cara-nuevos-programas-defensa-tenemos-todos-elementos-lideres-europa

Valencia, Catalonia, and Galicia, the development of a fully-fledged European industry capable of mass-producing microchips remains uncertain[90].

In the area of missile systems, Spain has not developed a fully indigenous guided anti-tank or anti-air missile, and continues to depend on foreign partners, which limits its full technological autonomy. Spain operates the Spike LR2, an anti-tank missile of Israeli origin, whose components are partially manufactured in Spain, but whose "brain" is produced by the Israeli company Rafael. In other words, Spain does not produce the most vital part of the missile; it depends on a third party, and its role is limited to assembling the components, leaving the national industry without full autonomy over the system[91].

Now, the situation appears to be changing, because given the context of the Israeli–Palestinian conflict, the Spanish Government has decided to distance itself from the purchase of weapons and technology from Israel, while also seeking to promote greater technological independence. The Ministry of Defence revoked the license to manufacture the Spike LR2 anti-tank missile in Spain, a contract for 1,680 units valued at €285 million. The Minister and Government spokesperson, Pilar Alegría, made it clear that the objective is to achieve "a total disconnection from Israeli technology,"[92].

The SILAM multiple-launch rocket system program has also had to be redesigned, because its PULS propulsion system, developed by the Israeli company Elbit, will no longer be used. The Ministry of Defence is now seeking an alternative, domestically produced propulsion system, but, as Cadena SER warns, this shift "could delay the development plans" for SILAM, since the live-fire tests had been scheduled for mid-2025.

The missile's manufacturers, Escribano and Expal, state that they are working to minimise any delay and are evaluating all available alternatives[93]. Even so, replacing foreign

[90] del Castillo, C. (2025, marzo 23). *Europa ha fallado totalmente en atraer una fábrica de chips avanzados*. ElDiario.es. https://www.eldiario.es/tecnologia/europa-fallado-totalmente-atraer-fabrica-chips-avanzados_128_12152383.html

[91] Molpeceres, D. (2024, mayo 28). *De misiles a lanzacohetes: las nuevas armas de España con tecnología israelí, pendientes de la crisis diplomática*. El Independiente. https://www.elindependiente.com/economia/2024/05/29/de-misiles-a-lanzacohetes-las-armas-del-ejercito-con-tecnologia-israeli-mas-sensibles-a-la-crisis-diplomatica/

[92] Medrano, T. (2025, junio 3). *España cancela un contrato para misiles antitanque fabricados por una filial israelí*. AP News. https://apnews.com/article/espana-israel-contrato-misiles-abda48e5220a84b788d86922f8c22fd6

[93] Bañuelos, J. (2025, mayo 30). *Defensa trabaja en alternativas tecnológicas para dejar fuera a la compañía israelí Elbit del programa de lanzacohetes Silam*. Cadena SER. https://cadenaser.com/nacional/2025/05/30/defensa-trabaja-en-alternativas-tecnologicas-para-dejar-fuera-a-la-compania-israeli-elbit-del-programa-de-lanzacohetes-silam-cadena-ser/

components with domestically developed ones in systems such as Spike or SILAM requires redesigning the missiles themselves, along with the investment and time needed to develop the substitute components, carrying the risk of delaying the planned timelines.

The lack of critical industrial capabilities could limit Spain's operational autonomy. Francisco Sánchez, president of Airbus Spain, emphasised in June that Europe still needs time to achieve its long-desired strategic autonomy, adding that the investment required to attain it is "very large." He warned that increasing defence spending to 5% "is only meaningful if there is an industrial plan behind it, one that must be developed jointly by the Armed Forces and the industry," and that if Europe continues purchasing abroad, in the United States, it will only "deepen the problem of current dependence"[94]. A rapid rearmament without strengthening the domestic industry would therefore deepen this technological and industrial gap and leave Spain even more at the mercy of foreign suppliers, limiting its operational sovereignty.

In conclusion, Spain is not yet prepared to sustain an immediate rearmament, although it has begun to chart the path toward being able to do so. The national industry possesses potential and specific areas of expertise, but it suffers from clear limitations in scale, delivery timelines, and technological autonomy. The lack of industrial cohesion and the accumulated delays reflect a structure that is not accustomed to operating under pressure or at high production rates.

Therefore, rearmament will only be viable and sustainable if it is accompanied by a profound transformation of Spain's defence industrial base: expanding capabilities, professionalizing the supply chain, reducing external dependencies, supporting the development and growth of national companies, and executing allocated funds with rigor. Otherwise, the risk is that the available resources will not translate into concrete results on time, leaving Spain behind its European partners at a critical moment for its security and international role. As of today, the political and financial momentum exists, but it has not yet been proven that the system can respond with the agility and scale required by the current strategic context.

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[94] Trelles, G. (2025b, junio 20). *La industria militar coincide con Sánchez y alerta de que las prisas de la OTAN llevan a comprar armamento no europeo: "En muchas tecnologías estamos 30 años por detrás de EEUU"*. infobae. https://www.infobae.com/espana/2025/06/20/la-industria-militar-coincide-con-sanchez-y-alerta-de-que-las-prisas-de-la-otan-llevan-a-comprar-armamento-no-europeo-en-muchas-tecnologias-estamos-30-anos-por-detras-de-eeuu/

Dependence on U.S. Technology: Risk or Necessity?

Technological dependence in defence does not only involve possessing military equipment, but also the software, logistics, and all the associated control systems. Spain, like other allied countries, may own U.S.-made equipment, but to operate it fully it must comply with the licenses, authorisations, and limitations established by the original provider, in this case, the United States.

In recent years, it has become increasingly evident that Europe's ownership of many advanced weapons depends on the United States. For example, the American F-35 fighter jet, operated by multiple European countries, requires periodic software and logistical system updates that are connected to servers in North America. This constant connection gives Washington the ability, if it wished, to remotely disable any foreign F-35, grounding the aircraft and rendering it inoperable[95]. This means that any political decision or a cyberattack targeting those networks could paralyse the entire fleet of fighter jets, and such dependence could pose a serious risk for the countries that operate them.

Moreover, other acquired systems show a similar logic of dependence. For example, the Patriot anti-missile batteries ordered by Spain from the United States are currently experiencing severe delivery delays due to industrial bottlenecks in the U.S., and may not reach Spanish hands until 2029–2030. These delays abroad compromise the modernisation of Spain's air-defence capabilities and hinder an important part of the national rearmament plan[96]. Similarly, Spain's new F-110 frigates built by Navantia incorporate U.S. technology, such as their Aegis naval combat system, whose SPY-7 radars, produced by the American company Lockheed Martin, are negatively affecting the delivery schedule of these ships to the Navy. This is because the production of these radars has been delayed, forcing Navantia, which had been progressing at a good pace, to shift to a new deadline of late April 2028, thereby also impacting Spain's overall rearmament efforts[97].

[95] *¿Pueden los EE.UU. dejar en tierra los F-35 de los países europeos?* (2025, marzo 3). Galaxia Militar. https://galaxiamilitar.es/pueden-los-ee-uu-dejar-en-tierra-los-f-35-de-los-paises-europeos

[96] González, M. (2025, junio 24). *Las capacidades que España ha comprometido con la OTAN: de defensa antimisil a sistemas contra drones*. Ediciones EL PAÍS S.L. https://elpais.com/espana/2025-06-24/las-capacidades-que-espana-ha-comprometido-con-la-otan-de-defensa-antimisil-a-sistemas-contra-drones.html

[97] Infodefensa.com. (2024, enero 10). *El radar SPY-7 retrasará las entregas a la Armada de las fragatas F-110: la primera no llegará hasta abril de 2028*. La Razón. https://www.larazon.es/espana/defensa/radar-spy7-retrasara-

These conditions entail significant limitations, not only for Spain but for European sovereignty as a whole. For example, more than 60% of the weaponry purchased by EU member states comes from non-European suppliers[98], which may suggest that Europe, for the moment, is unable to increase its production rapidly and autonomously, and is therefore turning outside the continent to obtain the components needed for its urgent rearmament. Moreover, the current political uncertainty in Europe's relationship with the United States puts the continent's security at risk and further highlights this dependence. One example of this was in March 2025, when the Trump administration suspended the transfer of vital military intelligence to Ukraine[99], leaving it without support overnight, something that could be repeated with any other European country.

The economic impact is also significant, since acquiring foreign technology is usually more expensive and, as we have seen, can greatly delay delivery timelines. The Spanish Government estimates that an abrupt increase in military spending to 5% of GDP would result in an additional €100 billion per year in technological dependence on foreign suppliers[100]. Since the current European industry is not prepared to absorb such an immediate increase in demand, Europe would have to seek these capabilities abroad, thereby deepening the vicious circle of dependence and all but guaranteeing delays in future projects. Consequently, purchasing abroad, given today's urgent context and high level of demand, could end up limiting available quantities, increasing unit costs, and delaying the development of national capabilities.

To reduce this vulnerability, Spain and Europe must strengthen key sectors of their own military technology, supporting national and European programs in the most strategic areas, such as artificial intelligence, drones, cybersecurity, interoperability, microchips, and satellites. If Europe succeeds in developing these capabilities, it could reduce its

entregas-armada-fragatas-f110-primera-llegara-abril-2028_20240110659ee5ce67d53e0001dfaf65.html

[98] *Seis Claves: Europa y su dependencia militar de Estados Unidos*. (s/f). Política Exterior. Recuperado el 29 de julio de 2025, de https://www.politicaexterior.com/articulo/seis-claves-europa-y-su-dependencia-militar-de-estados-unidos/

[99] Sánchez, M. R. (2025, marzo 5). *Estados Unidos congela el suministro de inteligencia militar a Ucrania*. Cadena SER. https://cadenaser.com/nacional/2025/03/05/eeuu-congela-el-suministro-de-inteligencia-militar-a-ucrania-cadena-ser/

[100] González, M. (2025, junio 24). *Las capacidades que España ha comprometido con la OTAN: de defensa antimisil a sistemas contra drones*. Ediciones EL PAÍS S.L. https://elpais.com/espana/2025-06-24/las-capacidades-que-espana-ha-comprometido-con-la-otan-de-defensa-antimisil-a-sistemas-contra-drones.html

dependence on foreign suppliers, a dependence that, as we have seen, grows in multiple ways and threatens European strategic sovereignty on several fronts.

Towards Strategic Autonomy: Options and Opportunities

The war in Ukraine exposed Europe's industrial and investment shortcomings in the field of defence. This reality has strengthened Europe's willingness to cooperate, as the EU promotes initiatives such as Permanent Structured Cooperation (PESCO) and the European Defence Fund (EDF) to integrate the industries and programs of all member states. Spain has not wanted to remain on the sidelines; it therefore participates actively in these initiatives. In fact, in the most recent calls, 58% of the new EDF projects include the participation of Spanish companies, which is highly positive both for the companies themselves and for Spain[101].

Under PESCO, launched in 2017, Member States collaborate on joint programmes to address capability gaps. In 2018, Spain joined several strategic projects, among them the development of the MALE Eurodrone unmanned aerial system. Together with France, Germany, and Italy, Spain has worked on the design of a European medium-altitude, long-endurance drone in cooperation with Airbus Defence and Space, with the goal of reducing dependence on the U.S. MQ-9 Predator B. This drone, whose entry into service is planned for 2028, will have long endurance and will be capable of carrying out intelligence, surveillance, reconnaissance, and even strike missions[102].

Up to 2024, Spain was participating in 31 PESCO projects, to which another four were added in 2025[103]. These projects cover a wide range of areas, such as space, cybersecurity, aerial systems, the maritime and land domains, training, and, especially, the area of joint enablers, which stands out for its importance. This last category includes

[101] europa press. (2025, mayo 9). *El Fondo Europeo de Defensa destina 691 millones a proyectos de I+D con participación española*. europa press. https://www.europapress.es/economia/noticia-fondo-europeo-defensa-destina-691-millones-proyectos-id-participacion-espanola-20250509163148.html

[102] de Santos, Á. L. (2025, enero 21). *Así son los tres grandes drones militares que tendrá el Ejército del Aire, similitudes y diferencias: MQ-9 Predator, Eurodrone y Sirtap*. La Razón. https://www.larazon.es/espana/defensa/asi-son-tres-grandes-drones-militares-que-tendra-ejercito-aire-similitudes-diferencias-mq9-predator-eurodrone-sirtap_20250121679003e31236b600015edb6b.html

[103] InfoDefensa, R. D. (s. f.). *Pesco*. Infodefensa - Noticias de defensa, industria, seguridad, armamento, ejércitos y tecnología de la defensa. Recuperado 31 de julio de 2025, de https://www.infodefensa.com/tag/pesco

eight projects in which Spain is involved, focused on developing joint military capabilities and improving interoperability among Member States[104].

In parallel, the European Defence Fund (EDF) finances collective R&D programmes. During the 2021–2022 period, the EDF supported more than 100 projects with an estimated value of €2 billion, in critical areas such as air and naval combat, cybersecurity, sensors, and others. All of these programmes directly benefit the interests of both Spain and the European Union as a whole.

Spain now ranks as the third country in number of companies and research institutes participating in these projects, behind only France and Italy, and ahead even of Germany. This level of participation reflects the firm commitment of the Spanish industry to European cooperation and regional technological development. Moreover, this involvement helps compensate for Spain's national budget limitations, since the Spanish defence budget allocated to R&D is considerably lower than that of countries such as Germany or France[105].

This joint effort within the framework of PESCO and the European Defence Fund (EDF) seeks precisely to overcome national shortcomings, allowing EU countries with more limited economic capacity to access European-made technological developments. Through multinational projects, investment costs are shared so that many states that would not be able to assume them individually can do it and benefit. The EDF, for example, promotes the creation of consortia in which major companies from different countries, such as Airbus, Leonardo, Indra, or Saab, collaborate with SMEs and technological research centers, thus fostering industrial cooperation and joint innovation[106].

Spain is involved in the major future-oriented programmes with European reach. Regarding the Eurodrone, the four participating countries have agreed to purchase a total

[104] Sempere, C. M. (s. f.). *Una revisión de la Colaboración Estructurada Permanente*. Real Instituto Elcano. Recuperado 31 de julio de 2025, de https://www.realinstitutoelcano.org/analisis/una-revision-de-la-colaboracion-estructurada-permanente

[105] Fiott, D. (s. f.). *¿Invertir e innovar? España y el Fondo Europeo de Defensa*. Real Instituto Elcano. Recuperado 1 de agosto de 2025, de https://www.realinstitutoelcano.org/analisis/invertir-e-innovar-espana-y-el-fondo-europeo-de-defensa/

[106] *European Defence Fund (EDF) - Official Webpage of the European Commission*. (s. f.). Defence Industry and Space. Recuperado 1 de agosto de 2025, de https://defence..industry..space.ec.europa.eu/eu-defence-industry/european-defence-fund-edf-official-webpage-european-commission_en

of 60 drones, of which Spain will receive 12 units[107]. This project, in addition to enhancing Europe's surveillance capabilities, also provides the continent with new advanced assets for its security and for strengthening European strategic autonomy.

At the European level, Spain participates actively in the new fifth-generation main battle tank project "Marte", launched in 2025. This programme, led by KNDS and Rheinmetall with the collaboration of Leonardo, Saab, and Indra, aims to develop a modular, highly technological tank that surpasses current models such as Spain's Leopard 2E. Spanish companies such as Indra, Escribano, Santa Bárbara Sistemas, and Sapa Operaciones lead key work packages, contributing to the integration of advanced systems and reinforcing Spain's industrial presence in European land-defence programmes[108].

This project symbolises a step toward European technological autonomy, while at the same time exposing the challenges Spain faces in accelerating the national production of complex combat systems.

Time has shown us the importance of coordinating spending and production at the European level. The war in Ukraine demonstrated that planning in isolation rather than jointly can lead to misalignment and operational gaps. To avoid this, EU Member States now align their needs much more effectively through the Coordinated Annual Review on Defence (CARD) and multinational projects (PESCO, OCCAR, etc.). The development of defence systems requires multi-year planning, since some governments still plan their military needs individually and with a short-term outlook, without fully considering that R&D can take decades.

This is why it is essential for Spain and its allies to continue working together and defending shared objectives. During the Spanish Presidency of the EU, particular emphasis was placed on the need to "develop defence capabilities… ensure freedom of action with European forces, and promote the development of our own industrial and

[107] Mateo Quinn. (2025, 3 de abril). *El Ejército del Aire español planea operar el futuro Eurodrone desde la base de Villanubla en Valladolid*. Infodefensa. De https://www.infodefensa.com/texto-diario/mostrar/5240213/ala-37-despide-mitico-aviocar-mirando-hacia-futuro#:~:text=El%20Eurodrone%20es%20un%20sistema,y%20aumentar%20la%20autonomía%20estratégica

[108] **Gallén, P.** (2025, 2 de julio). *España se incorpora al proyecto del carro de combate europeo con seis compañías*. *El Periódico*. Recuperado el 2 de julio de 2025, de https://www.elperiodico.com/es/economia/20250702/espana-incorpora-proyecto-carro-combate-119294094

technological base"[109]. This makes it clear that, from Spain and toward Europe, the idea of joint development is firmly established, and although in practice this means harmonising acquisition schedules, sharing key production facilities, and aligning innovation programmes, we are seeing that it is indeed feasible.

In summary, the shortcomings faced by both Spain and Europe in ammunition, electronics, sensors, and other areas demand a shared approach. While Spain gradually increases its budget, European cooperation allows each euro to have a multiplied impact. Joint frameworks reduce duplication and take advantage of economies of scale. In this way, the European defence industrial base, including Spain's, is strengthened through transnational projects that respond to the real needs of the Armed Forces of all European countries.

Turning to the areas where improvement is still needed, one can highlight the need for greater coordinated investment with a long-term vision. National plans of each state should be linked to the capability needs identified by the EU in the Coordinated Annual Review on Defence (CARD) and in joint programmes. Additionally, member states should jointly commit to synchronising stable multi-year budgets that prevent fluctuations, especially in R&D.

Furthermore, stronger transnational alliances should be promoted to integrate major companies with SMEs and technological centers across all countries. Past experience in other consortia, such as Marte, shows that this is an effective way to develop complex equipment, from tanks and ships to aircraft, taking advantage of economies of scale and distributing industrial workload and development among the partners.

Lastly, it is very important to channel European funding, whether it comes from the European Defence Fund or from the recently created SAFE instrument, towards truly disruptive defence research. Encouraging more financial mechanisms such as SAFE, which provides up to €150 billion to Member States to develop urgent investments in the European defence industry[110], is essential to continue promoting joint acquisitions and to

[109] **Fiott, D.** (2023, 26 de septiembre). *¿Invertir e innovar? España y el Fondo Europeo de Defensa*. Real Instituto Elcano. Recuperado el 2 de octubre de 2025, de https://www.realinstitutoelcano.org/analisis/invertir-e-innovar-espana-y-el-fondo-europeo-de-defensa/

[110] Consejo de la Unión Europea. (2025, 27 de mayo). *Instrumento SAFE: el Consejo aprueba un importe de 150 000 millones de euros para impulsar la adquisición conjunta en el ámbito de la seguridad y la defensa europeas*. Recuperado el 5 de octubre de 2025, de https://www.consilium.europa.eu/es/press/press-releases/2025/05/27/safe-

accelerate Europe's defence preparedness in the face of the current geopolitical environment.

Another sound investment would be to foster bi-national or regional technological hubs and to facilitate private investment in defence startups. In this way, Europe would ensure its ability to generate its own advanced technologies (AI, cybersecurity, sensors) instead of relying on external suppliers.

In short, advancing toward strategic autonomy requires combining Spain's effort with that of Europe as a whole. Improved joint spending, cooperative production, and shared innovation will allow Spain and its partners to close existing gaps between countries and to develop cutting-edge capabilities in line with the broader European project. Only through this approach will the technological and operational sovereignty that allied forces demand for the future be strengthened.

Conclusion

Spain is facing a historic opportunity to transform its defence policy and strengthen its strategic position in an international environment marked by great-power competition, the rise in conflicts, and technological uncertainty. The experience accumulated by its leading companies, combined with increased budgetary resources and the momentum of European programs, points to a viable path toward more modern, autonomous, and effective Armed Forces. However, the challenges remain significant: limited industrial scale, production delays, dependence on external components, and the absence of critical technologies all constrain Spain's real capacity to respond.

In this context, rearmament cannot be reduced to a matter of increased spending. It requires a long-term industrial strategy, sustained investment in R&D, reinforcement of the supply chain, development of critical national capabilities, and stronger European cooperation that enables the sharing of risks, resources, and technologies. Only through this combination; investment, innovation, and collaboration, can Spain move toward strategic autonomy, reduce its vulnerability to external suppliers, and consolidate Armed Forces capable of sustaining their international commitments and defending the country's interests in the emerging global order.

council-adopts-150-billion-boost-for-joint-procurement-on-european-security-and-defence/

Looking ahead, Spain's defence policy must not only aim to close current gaps but also anticipate emerging threats and seize disruptive technological opportunities. This implies investing in the development of capabilities in areas such as space, artificial intelligence, cyberdefense, and autonomous systems-domains that will define military superiority in the coming decades. It will also be crucial to strengthen the national security culture, improve the retention and training of highly qualified personnel, and consolidate cooperation with European partners and strategic allies. Only through a comprehensive, coherent, and sustained effort will Spain be able to guarantee its operational sovereignty, increase its geopolitical weight, and play a relevant role in shaping international security in the twenty-first century.

Alberto Ferreres Fernandez

International Relations Student in the University of Navarra.

Intern in the Instituto Español de Estudios Estratégicos.