



2022 CARD REPORT

In response to Russia's war of aggression against Ukraine, EU Member States have announced defence spending increases and are, working to replenish stocks and improve readiness of their forces and capabilities. Announced budget increases can provide greater room for European cooperation on new capabilities. However, with defence planning and development of military assets taking place at a national level, anticipating and identifying opportunities for European cooperation is often impeded. The Coordinated Annual Review on Defence (CARD) provides an overview of the EU defence landscape to help improve its coherence overtime. The 2022 CARD Report offers key strategic and political messages, actionable recommendations and concrete cooperation opportunities.

2022 CARD RECOMMENDATIONS

Repair the Past



Increase defence expenditure

- Ensure that the increase contributes to meeting EU and Member States defence needs;
- Close capability identified gaps.

Prepare Today



Plan together for 2040

- Elaborate a common long-term capability outlook;
- Support Member States in adopting an EU approach for cooperative capability planning, R&D, acquisition, and integration of capabilities;
- Bringing Member States closer to a European security and defence culture;
- Continue increasing the availability and readiness of forces.

Win the Future

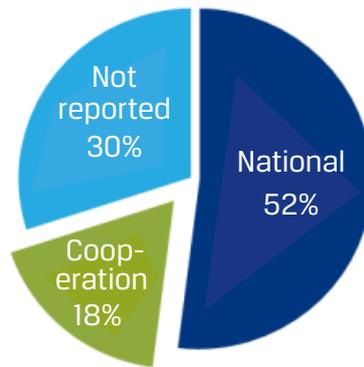


Capable and coherent
European defence

- Take forward CARD collaborative opportunities through projects in PESCO, EDF or other frameworks;
- Further improve coherence among EU defence initiatives (CARD, PESCO, EDF);
- Continue to mainstream them into national defence planning and policy documents;
- Address further shortfalls in strategic enablers.

Defence Cooperation remains the exception

Only **18%** of all investment in defence programmes is conducted in cooperation



Main drivers ✓

- national industrial benefits
- consolidation of strategic partnerships
- cost savings and
- increasing operational output

Main impediments ✗

- complex legislation
- pressing timelines
- lack of budget or
- qualified personnel

Process to projects



The European Defence Landscape in 2022

Defence expenditure grew significantly to €214 billion in 2021 (up 6% compared to 2020) and is estimated to grow further by up to €70 billion by 2025. CARD identifies a clear risk from isolated defence spending in the medium to long term. This risk seems further substantiated if Member States favour individual, non-EU off-the-shelf procurements over longer-term investments.

Member States prioritise high-end capabilities in the traditional air, maritime and land domains, where the percentage of investment is comparable to the 2020 CARD cycle. The grey area (30%) represents the amount of investment without an associated programme, has substantially increased from the previous cycle.

CHART: Total Investment per operational domain (2019 - 2025)

