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On The Cover

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> “EX GUNNER DUKE”
> Members of The British Columbia Regiment and The British Columbia Dragoons are given a familiarization tour of the Leopard II Main Battle Tank by members of Lord Strathcona's Horse Regiment during Exercise GUNNER DUKE at CFB Wainwright, Alberta, 18 March 2021.
> Photo: Private Daniel Pereira, 39 CBG Public Affairs

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Abstract

Since 2022, NATO has moved beyond setting spending targets and begun to shape defence industrial production in member countries. The action plan agreed to at the Vilnius Summit, the industrial capacity pledge signed at Washington, the two-tier, 5 per cent budgetary commitment adopted at The Hague, and the procurement framework unveiled at the 2026 Ankara Summit together amount to an Alliance industrial policy. Canada has so far treated these commitments primarily as a fiscal question. Affordability, however, is only part of what is at stake. The other part is industrial, and concerns what Canada builds, to whose standards and through which programs. This policy paper argues that the emergent NATO industrial policy is as much a market opportunity as a fiscal obligation for Canada. Canada's defence industry, built on smaller firms supplying components into Allied supply chains, is well positioned to exploit the openings created at the Ankara Summit, including the NATO Engine, the counter-drone marketplace, and the published demand signal. The paper recommends that Ottawa (1) concentrate its industrial effort on the segments where Canada already competes, above all the processing of critical minerals; (2) enter the horizontal channels opened at Ankara and join multinational programs while their terms are still being set; (3) define what it will count under the 1.5 per cent budgetary category and file the national implementation plan the Washington pledge requires; and (4) use its place inside both the European and North American industrial tracks to negotiate access rather than merely watch the boundary between them.

Introduction

For most of its history, NATO told its members how much to spend on defence while leaving what to build to national governments and their markets. That division of responsibility is now ending. Since 2022, the Alliance has assembled, piece by piece and with little public notice, something it had never possessed before: a defence industrial policy. A production action plan agreed to at Vilnius, an industrial capacity pledge signed at Washington, a two-tier investment commitment adopted at The Hague, and now a summit in Ankara that added more than fifty billion US dollars[i] in new procurements on top of the pledges,[1] together constitute that policy. Defence industrial policy topped the agenda in Ankara. The NATO Summit Defence Industry Forum, the Alliance's premier industrial gathering, filled the entire first day of the Summit program. The heads of state and government, by contrast, sat in formal session for only a single morning.[2]

Underlying these developments is a shift from demand signals to industrial governance. Where NATO's Cold War spending targets addressed the level of national effort, the instruments introduced since 2022 address its content: what is produced, at what scale, to which standards, and in cooperation with which Allies. For a middle power like Canada, the consequences are mixed. The aggregation of Alliance demand opens markets beyond the reach of any single mid-sized industry, while the accompanying national industrial plans, annual reporting, and competition for shared contracts extend Alliance obligations well beyond their familiar budgetary form.

Canada's defence industrial policy was already in the making. Ottawa established the Defence Investment Agency in October 2025, secured participation in the European Union's SAFE rearmament financing instrument in December 2025, and published its first Defence Industrial Strategy in February 2026.[3] These measures place Canada among the better-prepared middle powers. The most recent shifts in NATO's industrial policy, however, will require Canada to recalibrate its approach.

The key contention in this paper is that the Canadian debate runs the risk of misreading NATO's industrial turn. By treating the Alliance's new commitments largely as a matter of fiscal burden, that debate has passed over their industrial content. The instruments assembled since 2022 not only raise the price of membership, but also constitute a market for which Canada's industrial base is comparatively well suited. Whether Canada draws any advantage from that market will depend less on how much it spends than on how effectively it engages the new machinery the Alliance is building.

[i] All NATO figures in this paper are in US dollars; Canadian figures are in Canadian dollars.

This paper proceeds in four sections. The first section traces how the Alliance came to adopt an industrial policy since 2022. The second examines what the new instruments accomplish, and what an Alliance of sovereign states can and cannot achieve in coordinated industrial policy. The third turns to Canada: the fiscal arithmetic of the new commitments, the structure of the defence industrial base, and the policy framework Ottawa built over the past year. The final section sets out four recommendations for Canadian policy after the Ankara Summit.

From Spending Targets to Production Coordination

NATO's industrial turn is motivated by material necessity. Ukraine's consumption of artillery ammunition in 2022 and 2023 outran what the entire Western industrial base could produce; by early 2023 the waiting time for large-calibre ammunition had stretched from 12 to 28 months.[4] The recognition that the world's wealthiest Alliance could not manufacture shells at the tempo of a regional war exposed a gap between the Alliance's political commitments and its industrial capacity.

NATO's industrial policy took shape incrementally, through a series of decisions taken at the Alliance summits. At Vilnius in 2023, leaders agreed on the first Defence Production Action Plan, which set out to aggregate Allied demand, clear production bottlenecks, and push standardization far enough that Allied production could serve Allied forces interchangeably.[5] In 2024, Washington produced the NATO Industrial Capacity Expansion Pledge, which called for faster industrial growth and large-scale multinational procurement and promised to foster an industrial base in which "reciprocal cooperation and openness are the norm."[6] Critically, each ally agreed to draft a national implementation plan and report annually against measurable outcomes. An updated action plan followed in February 2025 to give these commitments operational form.[7]

Pledges and policy initiatives were quickly followed by spending decisions. Defence ministers agreed on a new generation of capability targets in June 2025.[8] Three weeks later, at The Hague, leaders adopted the 5 per cent commitment. It combined two elements: at least 3.5 per cent of GDP for core defence spending, plus up to 1.5 per cent for defence-related investment, which includes critical infrastructure, resilience, innovation, and the defence industrial base itself. Progress will be reviewed in 2029.[9] The novelty is in the interlocking design: capability targets say what each ally should build toward, the 3.5 per cent pays for it, the 1.5 per cent finances the infrastructural hinterland behind it.

The 2026 Summit in Ankara was critical because it decisively and visibly shifted the focus from spending to production. The Summit declaration announced more than fifty billion dollars in new procurements, committed Allies to expanding collective manufacturing capacity, and pledged continued work on eliminating defence trade barriers among them.[10] The Secretary General put the combined additional defence investment by European Allies and Canada across 2025 and 2026 at some 258 billion dollars.[11]

The contract totals attracted the most attention, but the industrial framework is equally significant. To begin with, the leaders endorsed a Strategy for Industry-NATO Cooperation.[12] NATO launched an Innovation Scale-Up Package with three components: the first public version of the Alliance's innovation demand signal, distributed to suppliers through a new Front Door for Industry portal; a call on private capital to finance defence production; and, most critically, the NATO Engine, a "factory-for-hire" network that matches firms lacking production capacity with factories that do. The demand signal names the areas where Allied demand is firmest, including the combat effectiveness of large land formations and defence against air and missile attack. The Engine is being piloted by the NATO Support and Procurement Agency, with an initial phase that began in July 2026, and is open to Ukrainian participation.[13] The single largest procurement line was counter-drone: more than forty billion dollars over five years, backed by a planned NATO marketplace of tested, inter-operable systems and a commitment to train five times as many drone operators by the end of 2027.[14] Taken together, the measures adopted at Ankara indicate that the Alliance has assumed a more direct role in governing what its members produce.

What an Alliance Industrial Policy Does

NATO's industrial policy operates under a basic constraint. An Alliance of 32 sovereign states cannot nationalize an industry, subsidize a firm, or direct investment. These powers remain, with good reason, with national governments. What the Alliance can do is shape the conditions under which its members produce. Its instruments for doing so fall under four headings: demand aggregation, the pledge-and-report cycle, standardization, and the newly designated 1.5 per cent budgetary category.

Demand aggregation addresses the problem of scale. By pooling orders, the Alliance aims to convert 32 potentially divergent national demand signals into one. Pooled orders are larger and steadier, and they give manufacturers a more convincing reason to invest in production capacity that no single government could justify on its own. Aggregation also lowers unit costs and reduces the uncertainty created by national budget cycles. Pooled buying already works on a small scale: the multinational tanker fleet, which announced the imminent delivery of its tenth Airbus A330 during the Ankara Summit, shows the model in operation. The GlobalEye negotiation that opened at Ankara follows the same route, with a group of Allies buying early-warning aircraft together rather than separately.

The pledge-and-report mechanism relies on transparency. Under the Washington pledge, each ally committed to expanding its industrial capacity, and each must now prepare a national plan, share it with the other Allies, and report on its progress annually. There is no formal penalty for falling behind. Nevertheless, the reporting mechanism makes each government's performance visible to the others, and the 2029 review sets a date by which the gaps will be difficult to explain away. Soft governance of this kind is familiar from other international regimes, and it tends to work better than the absence of enforcement would suggest.

Standardization has received less attention than either of these instruments, but it is in fact of critical importance. Coordination failures have been a persistent feature of Allied procurement for decades, and their costs are real, as the war in Ukraine showed even for nominally standard artillery ammunition. Common standards address the problem at the source, since a component built to an Alliance standard has a market in every member state. NATO's planned counter-drone marketplace, announced at Ankara, applies the same logic directly by making NATO-tested, NATO-compatible systems available for purchase.

The 1.5 per cent budgetary category, finally, is perhaps the most innovative element of the new framework. Because infrastructure, resilience, innovation, and the industrial base now count as Alliance-creditable investment, spending that finance ministries were undertaking in any case, or should have been, earns credit within the Alliance.

One caveat is in order. How far this collective action goes will depend on economic nationalism and domestic politics. "Reciprocal cooperation and openness" coexist with Buy American laws in the United States and with a major campaign of European rearmament, financed through instruments such as SAFE and Readiness 2030, which carries European-preference rules of its own.[15] The pattern is familiar from trade politics, where commitments to openness coexist with protectionism and local-content rules. Even so, the movement toward a coordinated market is hard to miss. Production, procurement, and industrial capacity have moved from the margins of Alliance politics to its centre, and the seam between the two tracks, the boundary where NATO's open-market instruments meet the European Union's own rearmament rules, is precisely where middle powers will encounter obstacles and, potentially, openings.

Canada's Fiscal and Industrial Position

Canada announced in March 2026 that it had reached 2 per cent of GDP, twelve years after the Wales pledge, with Budget 2025 allocating $81.8 billion to new defence investment.[16] The path from there to The Hague commitment is of a different order entirely. The Parliamentary Budget Officer estimates that reaching 3.5 per cent core defence spending by 2035 would require additional outlays averaging $33.5 billion a year over the decade and would add some $63 billion to the federal deficit in 2035-36.[17] No federal budget has yet priced the full path to 3.5 per cent. That is the more demanding half of the commitment.

The 1.5 per cent component, however, is more manageable. Much of it can be met by spending Canada intends to make anyway on ports, corridors, energy systems, digital networks, and northern infrastructure. For this portion of the commitment, the task is less new money than early definition and planning, and a readiness to defend the accounting when the 2029 review arrives.

The industrial base needed to meet the production targets is growing, but still insufficient. Revenues reached $17.3 billion in 2024, up more than 85 per cent over a decade. The sector contributes over $11 billion to GDP and supports some 82,000 jobs. Exports approached $8 billion, nearly 70 per cent of which go to Canada's Five Eyes partners. Overall, the industry is three times more research-intensive than Canadian manufacturing.[18] The problem lies in its structure. More than 90 per cent of its firms are small and medium-sized enterprises, and much of what the sector makes enters American supply chains as components and subsystems rather than leaving Canada as finished platforms. None of this will change within the horizon of The Hague commitment, so Canadian policy must work inside those structural limits.

The recent shifts in policy point in the right direction. The Defence Investment Agency, created in October 2025 with legislation tabled in the spring of 2026 to establish it as a stand-alone entity, aims to compress procurement timelines and to use procurement deliberately as industrial policy. The Defence Industrial Strategy of February 2026, the first in Canadian history, organizes future acquisitions under a Build-Partner-Buy framework that directs procurement toward Canadian firms in areas of established strength, and it commits the government to the kind of national planning the Washington pledge requires.[19] SAFE participation makes Canada the first non-European country within the European Union's 150 billion-euro rearmament financing instrument, giving Canadian firms access to European joint procurement that most non-European states lack.[20] The foundations, therefore, are already in place.

What is needed at this point is a systematic way to think about how to position Canada's defence industry in the emergent NATO defence industrial market. For a country with Canada's endowments and its structure of firms, aggregated demand, Alliance standards, and the 1.5 per cent category are economic targets at least as much as obligations. In the absence of national champions, at least for the moment, the most promising route is to slot into aggregated procurement where Canadian comparative advantage already exists.

Each instrument carries a specific commercial opening for Ottawa. Agg-regated demand gives Canadian small and medium-sized suppliers access to order volumes that no domestic program could sustain. Common stand-ards allow a single qualifying product to be sold across the Alliance rather than into one national market. And the 1.5 per cent category permits infrastructure that Canada already intends to build to count toward the commitment. The question, then, is less whether the openings exist than whether Canada organizes itself to take them.

Recommendations After Ankara

1. *Concentrate on the segments where Canada can compete.*

The analysis points to a small number of areas where Canadian firms already hold an advantage: munitions and their inputs, sensors and subsystems, sustainment, and the processing of critical minerals. Spreading effort evenly across the defence industrial field would waste that advantage; concentrating it would not. Critical minerals deserve particular weight, because they are the one segment in which both Washington and Brussels need what Canada has. The United States has sought allied sources of processed minerals to lessen its dependence on China, the European Union treats the same materials as a strategic priority in its own rearmament, and Canada's Critical Minerals Strategy already names defence and allied supply among its objectives.[21] Handled deliberately, critical-minerals processing can be the primary Canadian contribution that binds the North American and European tracks together.

2. *Enter through the horizontal instruments and enter early.*

Ankara created several channels suited to the kind of industry Canada actually has. The NATO Engine matches firms that lack capacity to factories that hold it. The Front Door for Industry portal, together with the published demand signal, tells suppliers what the Alliance intends to buy. The counter-drone marketplace, once established, will make NATO-tested, NATO-compatible systems available to every ally. These instruments do not require a national prime, and each rewards the subsystem and component makers that are prevalent in the Canadian defence sector. Ottawa should steer its firms toward these channels and empower the Defence Investment Agency and the Trade Commissioner Service to guide them. The same reasoning applies to joint programs still being defined, among them the GlobalEye acquisition and the first procurements under SAFE. A participant that joins while the specifications are open can shape them, whereas one that joins later buys another country's design at another country's price.

3. *Bank the 1.5 per cent credit and file the implementation plan.*

Two of Canada's obligations can be met by a single act of documentation. The 1.5

per cent category rewards infrastructure, resilience, and industrial spending that Canada already funds or intends to fund. Defining early and publicly what it will count, and filing that accounting with NATO, turn planned spending into Alliance credit ahead of the 2029 review. The same national plan satisfies the Washington pledge, which requires each ally to file an implementation plan and report against it every year. Built on the Defence Industrial Strategy and reported on annually, that plan is also the credential Canada needs to invoke the pledge's language on openness when its firms meet content barriers in allied markets.

4. *Leverage the position between the two blocs.*

Canada is effectively the only ally that sits inside European rearmament financing while remaining part of the North American industrial base, and that position is an asset only if it is used. A Canadian firm can, in principle, qualify under both American and European rules at once, and Ottawa can press, from inside both camps, for the mutual recognition of content requirements that would let more firms do the same. Left unattended, the position becomes less tenable, with Canadian suppliers too foreign for Buy American and too distant for European preference, virtually excluded from both. A single office, in the Defence Investment Agency or in Global Affairs Canada, should hold the mandate to negotiate access and to flag the programs where Canadian firms risk falling between the two regimes.

Conclusion

For its first seventy-five years, NATO addressed industrial questions only intermittently. The Ankara Summit suggests that industrial policy has become one of its central concerns. Canada has signed every pledge in the sequence, and the Alliance has now shown how seriously it intends to follow through and how much of the action has migrated from spending to production. What those commitments amount to will become apparent over the next three years. By the time the 2029 review arrives, every ally's accounting will have been examined, the multinational programs now under negotiation will have fixed their specifications, and the NATO Engine and the marketplace will have placed their first contracts with the firms that arrived early. If Ottawa has concentrated on the segments where it competes effectively, banked its 1.5 per cent credit, and joined a handful of joint programs while their terms were still open, the defence industrial machinery built in 2025 and 2026 will have paid for itself. If it has not, Canada will remain an ally in good standing, with a shrinking share of the market its own commitments helped create. In either case, the outcome will be determined in procurement offices and supply chains rather than in the language of summit declaration.

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