

The Nordic Defence Capability Report

An Analysis of Public Procurement Trends (2015-2025)

This white paper is a collaboration between Nordic Procurement Labs, Dataverz ApS, Defense Tech Denmark, ODIN (Organisation for Defence Innovation in the New Nordics) and DI Forsvar og Sikkerhed.

It represents a collective effort to enhance the resilience and competitiveness of the Nordic region by providing data-driven insights into defense procurement.

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Executive Summary

This white paper is the first of a series presenting a bottom-up analysis of public defense procurement across **Denmark, Sweden, Finland, and Norway from 2015–2025**. Using data from the EU's Tenders Electronic Daily (TED) and the Open Contracting Partnership, we have assembled and normalized a dataset of **6,836 public procurement tenders** worth **€27.5 billion**. Our analysis extracts key patterns by spending category, buyer and supplier country to reveal what capabilities are being built, by whom, and from where. The goal is to shift the conversation from high-level budgets to the granular, capability-relevant signals found in procurement data, offering a unique view that complements existing research.

1. Introduction: A New View of Nordic Defense

Discussions about defense often revolve around a single question: "How much are we spending?" While important, headline budgets don't tell the whole story. This is the first report in a series where we will shift the focus to a more practical question: **"What capabilities are we actually building, both domestically and with our partners?"**

Against a backdrop of renewed geopolitical focus and the historic accession of Finland and Sweden to NATO, understanding the substance of defense investment has never been more critical. While individual Nordic countries may be relatively small, together they form a significant geopolitical bloc. In terms of both GDP and defense expenditure, the four nations collectively approach the scale of major European powers. This report is grounded in the premise that by better understanding their distinct and shared procurement patterns, this bloc can leverage its significant, untapped capacity for innovation and growth through stronger cross-border collaboration, becoming an even more relevant force for regional security.

Our analysis dives into the "middle tier" of the market, procurement large enough to require public tendering but below the level of nation-defining strategic platforms like combat aircraft. This is the segment **where small and medium-sized enterprises (SMEs) and dual-use technology firms can compete**, and where policy decisions directly shape the industrial base and operational readiness.

Bottom-up Analysis

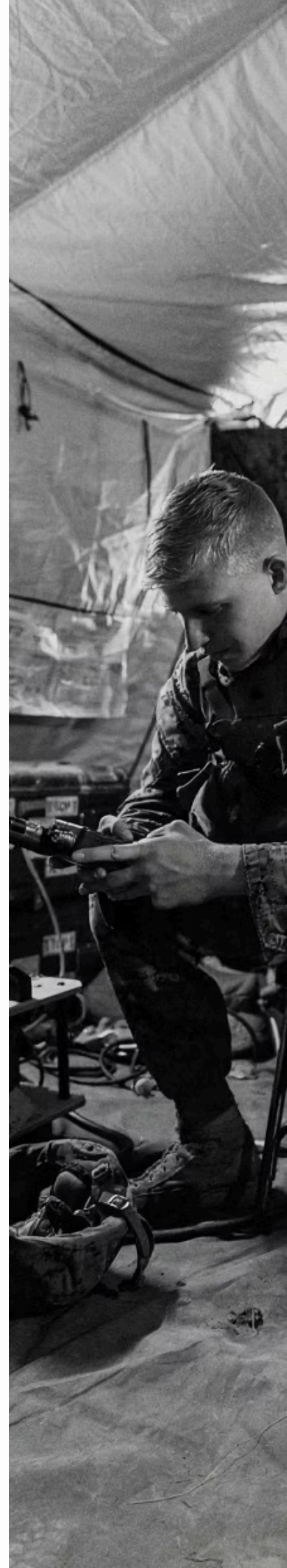
Examining 6,836 public procurement tenders worth €27.5 billion across Nordic countries

Middle Tier Focus

Targeting the market segment where SMEs and dual-use technology firms can compete

Capability Building

Revealing what defense capabilities are being built, by whom, and from where



2. Context and Contribution: A Unique, Bottom-Up Perspective

This report builds upon a significant body of research while offering a distinct, data-driven contribution based on four key differentiators.



Bottom-up Approach

We build our analysis from the most granular unit available: **individual tender result notices**. This allows us to drill down to a level of detail not possible with top-down budget reviews.



Comprehensive Dataset

Rather than relying solely on tenders formally tagged under the EU's Defence Directive, we developed a **comprehensive dictionary of hundreds of name variants for Nordic defense ministries, agencies, and related buyers**.



Current Analysis

By incorporating data from 2015 through mid-2025, this report provides an up-to-date picture of the post-2022 rearmament cycle, **capturing trends not visible in older studies**.



Nordic-centric Perspective

The Nordic countries share not only strategic challenges but also **culture, practices, and ambitions for deeper collaboration**. This report aims to provide insights that can help leverage that potential.

While we acknowledge the foundational work of institutions like the Norwegian Defence Research Establishment (FFI), which first highlighted the persistent "home bias" in procurement (FFI, 2016), our approach provides a new layer of detail. We illuminate the "hidden economy" of defense readiness, the vast market for sustainment, logistics, and services visible on TED, providing a complementary and practical lens through which to assess national strategies and market opportunities.



3. Methodology: Analyzing €27.5 Billion in Tenders

Data Source and Scope

Our primary sources are the EU Tenders Electronic Daily (TED) database amd Open Contracting Partnership data, from which we identified **6,836 defense-relevant tenders** with a total value of **€27.5 billion between 2015 and 2025**. To focus on tenders for which there are results with selected suppliers and to avoid duplication within the same family of tender notices, **we only use the final tender result notice, not the tender publication**.

To provide a comprehensive view, we moved beyond narrow "defense" labels by identifying tenders based on two signals:

1. **Contracts formally issued under the EU's Defence and Security Procurement Directive (2009/81/EC).**
2. Any **tender issued by a known defense buyer**, such as ministries of defense, armed forces, and their logistics or real estate agencies.

This expanded our dataset from approximately 1,500 strictly defense-tagged notices to the nearly 7,000 tenders that form the basis of this analysis.

Data Processing and Categorization

To enable meaningful analysis, we normalized the data by converting all contract values to Euros. We also grouped over 9,000 specific procurement codes into nine broad, intuitive categories (e.g., Defence & Security, ICT, Industrial & Construction...) to make trends easier to visualize and understand. For this report, supplier and buyer names are presented as published, with full entity normalization planned for future releases.

Data Source	Identification Method	Data Processing
• EU Tenders Electronic Daily (TED) database • Open Contracting Partnership • 6,836 defense-relevant tenders • €27.5 billion total value (2015-2025)	• Defence and Security Directive contracts • Tenders from known defense buyers • Expanded from 1,500 to nearly 7,000 tenders	• Normalized contract values to Euros • Grouped 9,000+ codes into 9 categories • Presented supplier/buyer names as published

The Interactive Dashboard

As part of this effort, we have created an interactive data dashboard that provides transparency beyond the static charts included in this report. The dashboard contains all the data referenced in our analysis and offers enhanced filtering and exploration capabilities, allowing users to conduct their own inquiries.

The dashboard can be accessed here:

① <https://pattr.nz/nordic-defense-dash>

1

Explore Procurement Data

Access comprehensive data on 6,836 tenders worth €27.5 billion across Denmark, Sweden, Finland, and Norway

2

Filter by Country and Category

Analyze spending patterns by nation, procurement category, and time period to identify trends

3

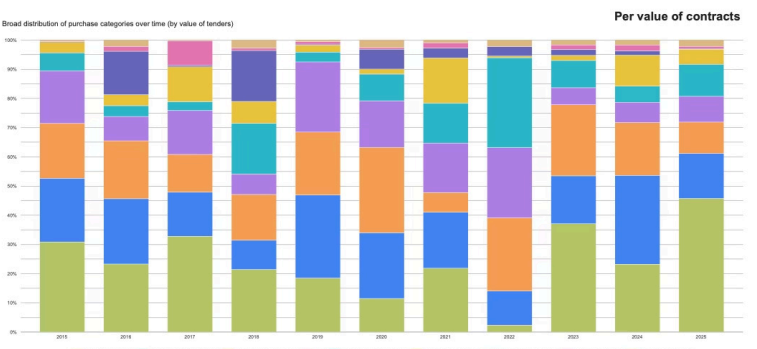
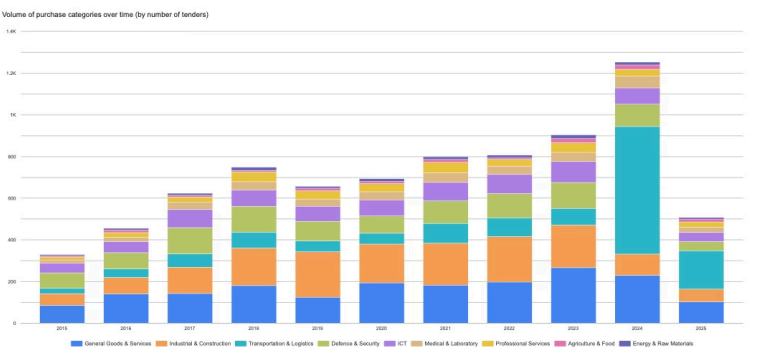
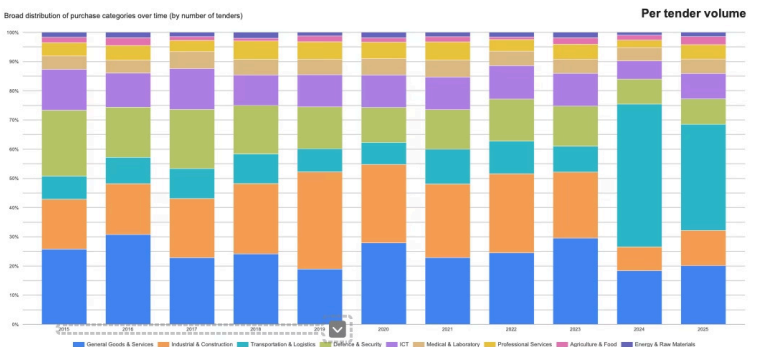
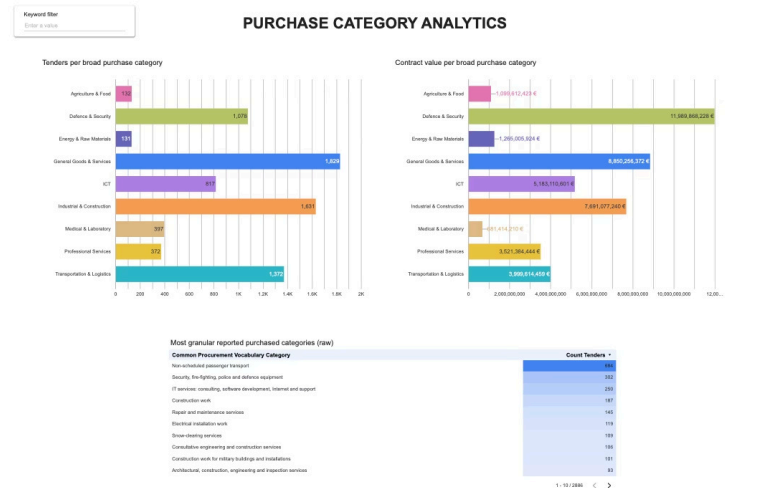
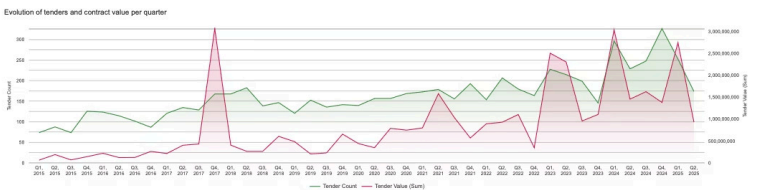
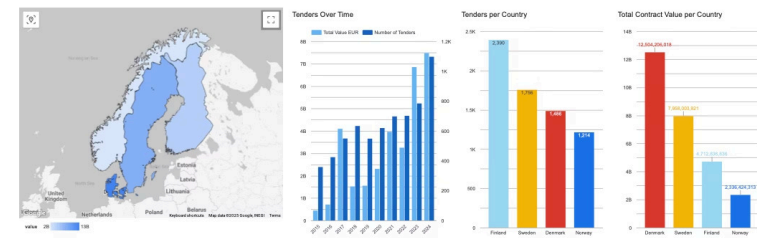
Country-Level Supplier Relationships

Examine buyer-supplier relationships (at country level) and cross-border procurement flows between Nordic countries

4

Conduct Custom Analysis

Create your own filters and export data for further research and business intelligence (advanced cross-filtering available soon)





Understanding Data Coverage: The "TED Capture Ratio"

The TED database captures a fraction of total defense spending (for example it does not include salaries or large strategic purchases outside public procurement). To contextualize our findings, we calculated a "capture ratio" for each country, which compares the value of tenders we observed on TED against that country's official defense expenditure for a given year.

$$\text{Capture Ratio} = (\text{Value of defense-relevant contracts on TED}) / (\text{Official defense expenditure})$$

This ratio is a measure of transparency and procurement strategy, not budget execution. It fluctuates based on whether a country is using classified contracts, bundling spending into large multi-year frameworks, or has timing differences between contract awards and actual payments.

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Avg.
DNK	8.8%	12.1%	71.9%	21.9%	22.4%	24.2%	12.0%	18.1%	38.1%	41.1%	27.1%
FIN	4.0%	5.0%	9.0%	5.3%	5.9%	9.0%	33.6%	18.4%	20.4%	7.2%	11.8%
NOR	NA	NA	0.2%	0.5%	0.4%	0.4%	1.3%	0.7%	2.1%	17.0%	2.3%
SWE	0.9%	2.8%	23.7%	6.2%	5.3%	10.5%	21.7%	13.1%	26.2%	12.6%	12.3%

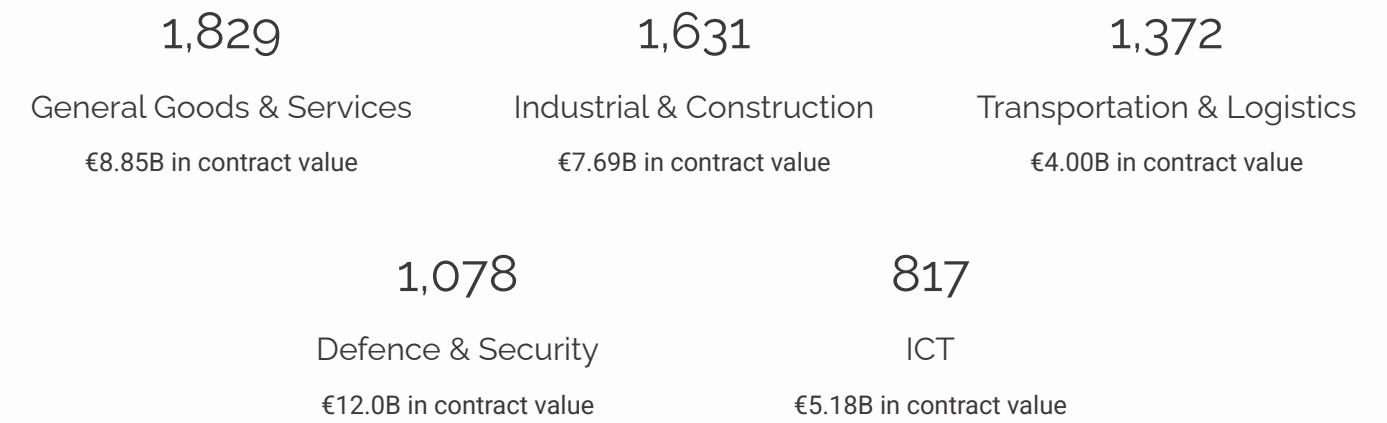
As the table shows, publication practices vary significantly. Denmark consistently shows the highest proportion of its spending on TED, while Norway's recent jump to 17% in 2024 suggests a potential shift in its procurement reporting.

4. Key Findings: What the Data Reveals

Our analysis of €27.5 billion in procurement reveals three distinct trends shaping the Nordic defense landscape. The charts presented in this section are highlights drawn from our comprehensive interactive dashboard, which allows for deeper exploration of these findings.

Finding 1: The "Hidden Economy" of Defense Readiness

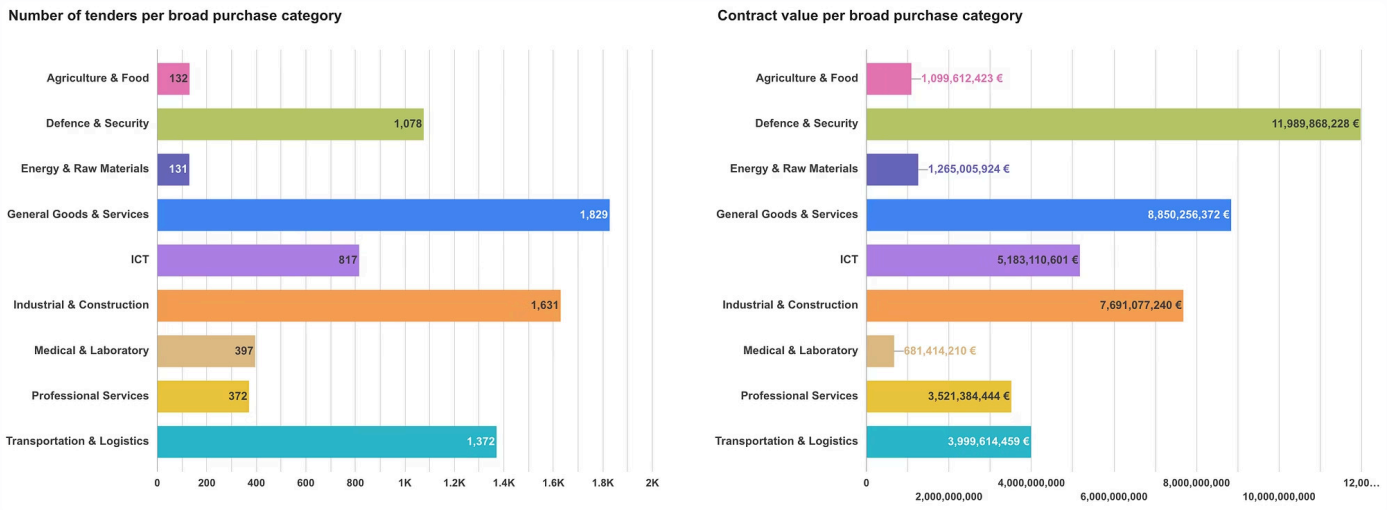
While classic defense and security systems represent the largest category by contract value (€12.0B), they are not the primary driver of procurement activity. By tender volume, the market is consistently dominated by capability-enabling categories that form a "hidden economy" essential for military readiness. Over the entire 2015-2025 period, these foundational categories accounted for the vast majority of all tenders.

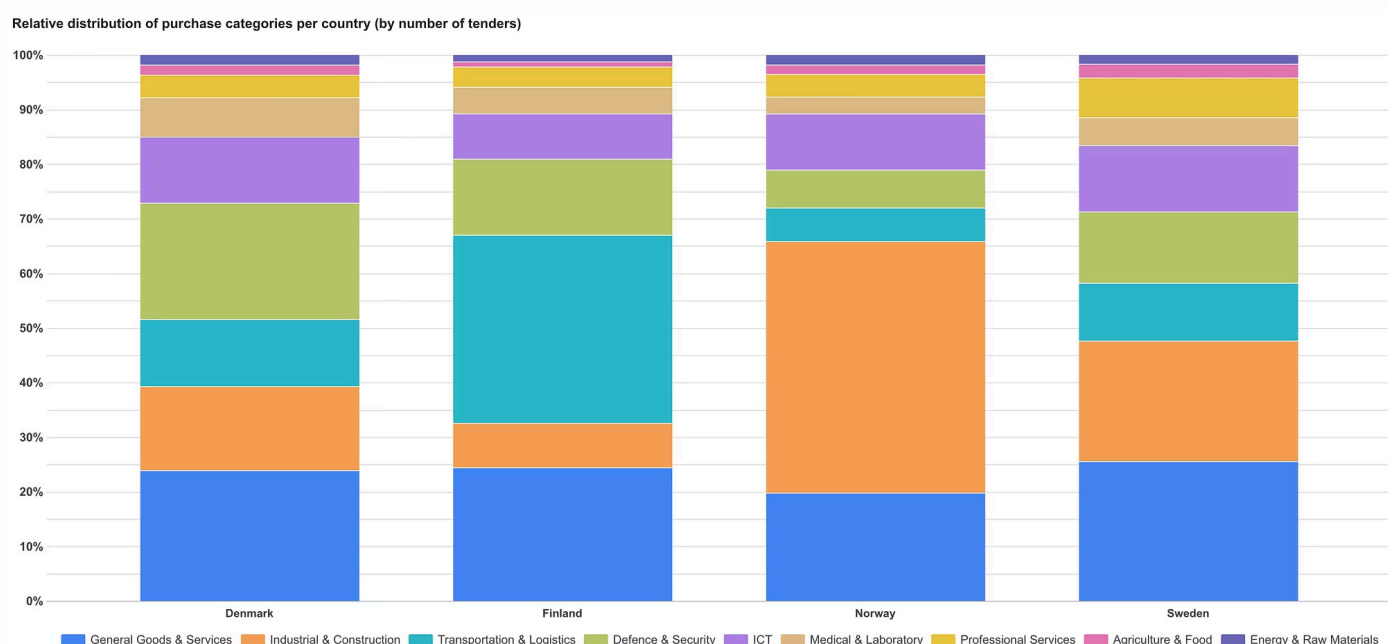
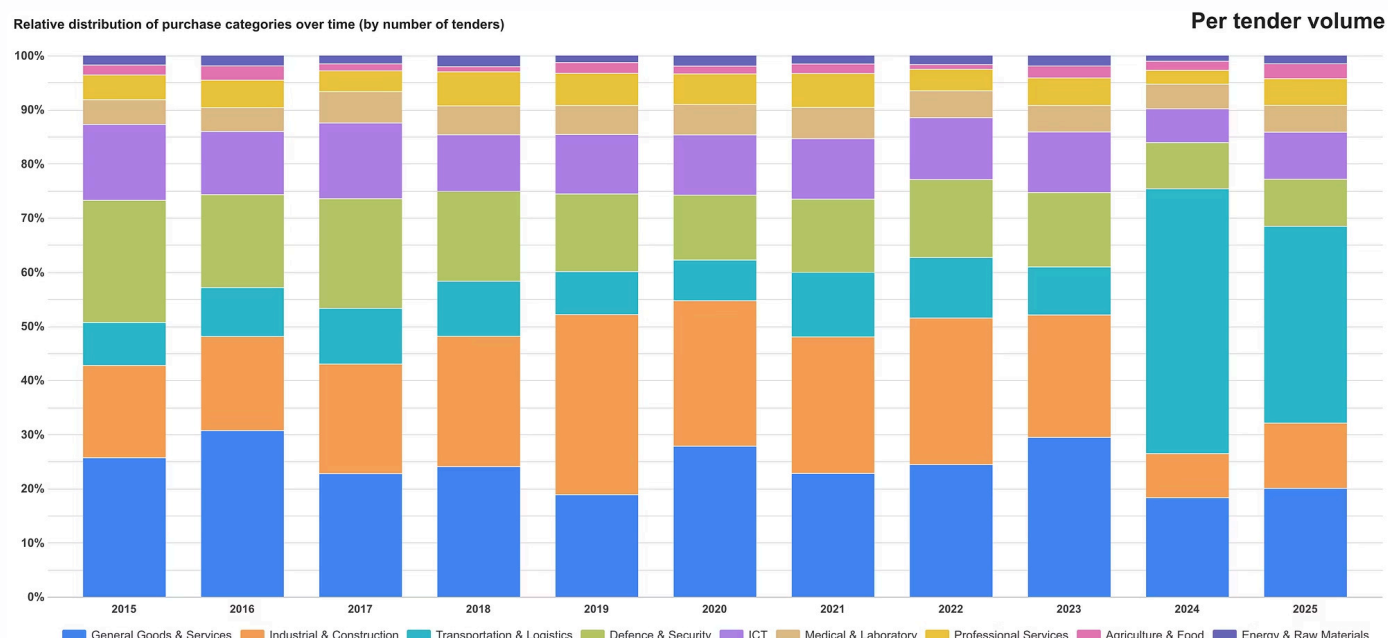


The remaining categories, **Medical & Laboratory**, **Professional Services**, **Energy & Raw Materials**, and **Agriculture & Food**, collectively account for an additional 992 tenders with a combined contract value of €6.57 billion.

The distribution of procurement activity has remained remarkably consistent over time, with non-traditional defense categories comprising the bulk of tender volume year after year. This pattern underscores that operational readiness is built on a wide industrial base. A notable exception is the dramatic surge in **Transportation & Logistics** tenders in 2024, which jumped to 612 from an average of just 65 in the preceding nine years, signaling a significant focus on mobility and sustainment.

Interpretation: The most frequent and accessible opportunities for suppliers, especially dual-use firms, are not in weapons manufacturing but in the construction, ICT, logistics, and services that underpin the entire defense enterprise.





This set of charts reveals key insights into the composition and trends of Nordic defense procurement from 2015 to 2025. The data shows that while Defence & Security accounts for the largest contract value, the "hidden economy" of operational readiness, comprising categories like General Goods & Services and Industrial & Construction, drives the majority of procurement activity by volume. This distribution has remained remarkably consistent over the period, with non-traditional defense categories making up the bulk of tenders year after year. A significant exception is the large increase in Transportation & Logistics tenders in 2024, which surged to 612 from an average of 65 in the preceding nine years. While the overall mix of procurement is similar across the region, distinct national patterns exist. For instance, Industrial & Construction is particularly prominent in Norway, whereas General Goods & Services consistently represents the largest proportion of tenders in all four countries.

Finding 2: A Clear Acceleration in Procurement Motivated by Russia's aggression against Ukraine

The procurement data clearly illustrates the Nordic region's strategic shift in response to Russia's aggression against Ukraine. While the full-scale invasion in February 2022 was a critical catalyst, the trend shows two distinct phases.

Phase 1 (2015-2021): A Gradual Awakening

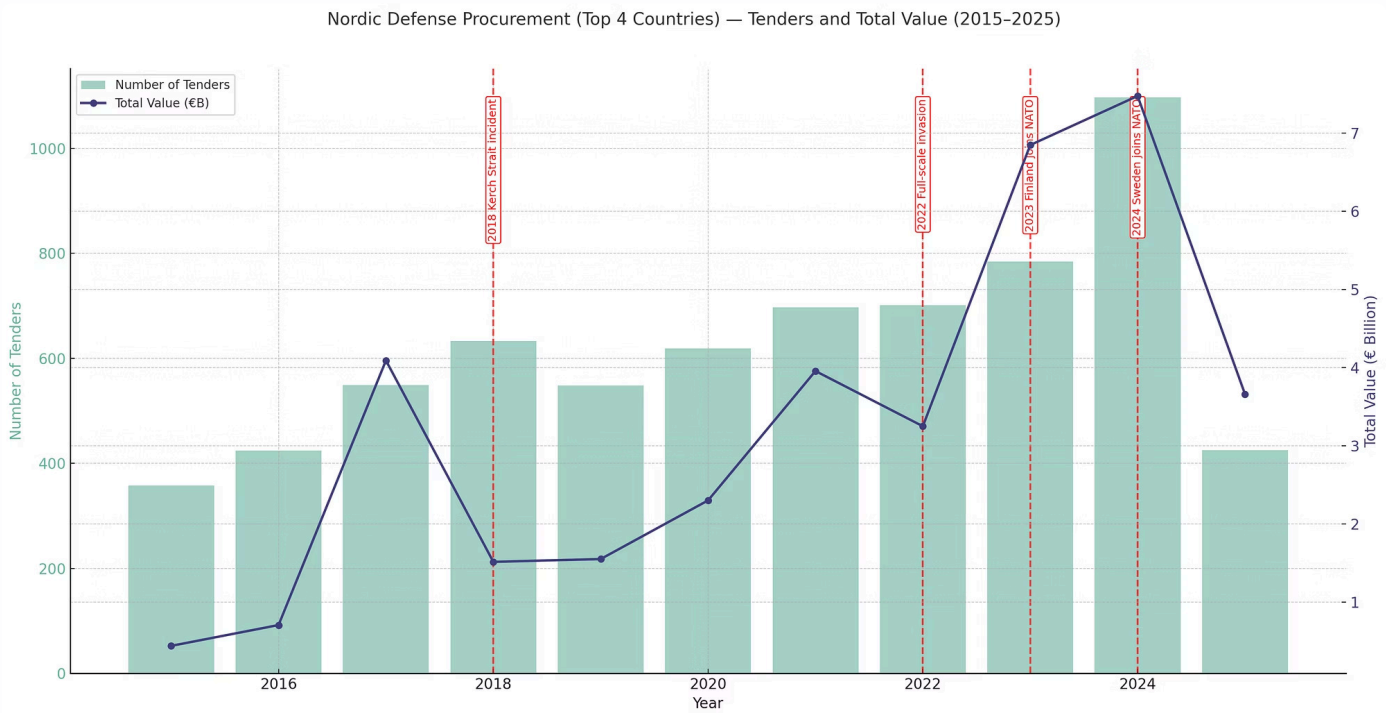
Following Russia's 2014 annexation of Crimea, procurement activity began a slow but steady climb. The annual number of tenders grew consistently, from 358 in 2015 to 697 in 2021. Contract value was more volatile during this period, marked by a significant peak of €4.1 billion in 2017, likely driven by a few large, multi-year framework agreements rather than a systemic, region-wide spending surge.

Phase 2 (2022-Present): The Rearmament Cycle

The 2022 invasion triggered a fundamental shift. Acknowledging the delay between political decisions, budget allocation, and contract awards, the data shows a dramatic acceleration beginning in 2023.

- The total contract value more than doubled from **€3.25 billion** in 2022 to a peak of **€7.48 billion** in 2024.
- The number of tenders likewise surged, jumping from 701 in 2022 to nearly **1,100** in 2024.

Interpretation: This increase represents the outcome of emergency defense budgets and a renewed focus on national and collective security, translating strategic imperatives into procurement action. The data provides a clear timeline of the Nordic region's transition from a peacetime posture to one of active deterrence and capability enhancement.



This chart illustrates defense procurement activity from 2015 to 2025 by both tender volume and contract value. It depicts two distinct phases: a gradual rise in procurement activity from 2015 to 2021, and a sharp acceleration starting in 2023. This shift is a tangible result of emergency defense budgets and a renewed focus on national and collective security following Russia's full-scale invasion of Ukraine in 2022. The number of tenders surged from 701 in 2022 to nearly 1,100 in 2024, and the total contract value more than doubled from €3.25 billion in 2022 to a peak of €7.48 billion in 2024.

Finding 3: Distinct National Sourcing Strategies

The data on supplier countries reveals divergent national strategies for building industrial capability, highlighting a clear distinction between domestic investment and international partnerships.

Sweden: The Domestic Champion

Sweden's strategy is defined by its powerful domestic defense industry. It is the largest supplier nation in the dataset, with Swedish firms winning **€9.8 billion** in contracts. The vast majority of this, **€5.8 billion**, comes from domestic contracts awarded by the Swedish government. This strong commitment to national industrial retention is clear in its procurement data, where **84% of tenders (932 of 1,109) are awarded to domestic firms**.

Denmark: The International Integrator

Denmark emerges as the region's primary importer, orchestrating a diversified global supply chain. This approach is evident in its tender data, where Denmark shows the highest reliance on foreign partners; **over a third (36.5%) of its contracts are awarded to international suppliers**, the largest share in the region. While Danish firms secured **€5.4 billion** in domestic contracts, Denmark also spent heavily abroad, with major procurement flows from the **United States (€2.44B)**, **Sweden (€2.0B)**, **Israel (€1.6B)**, and **Germany (€1.0B)**.

Finland: The High-Volume Operator

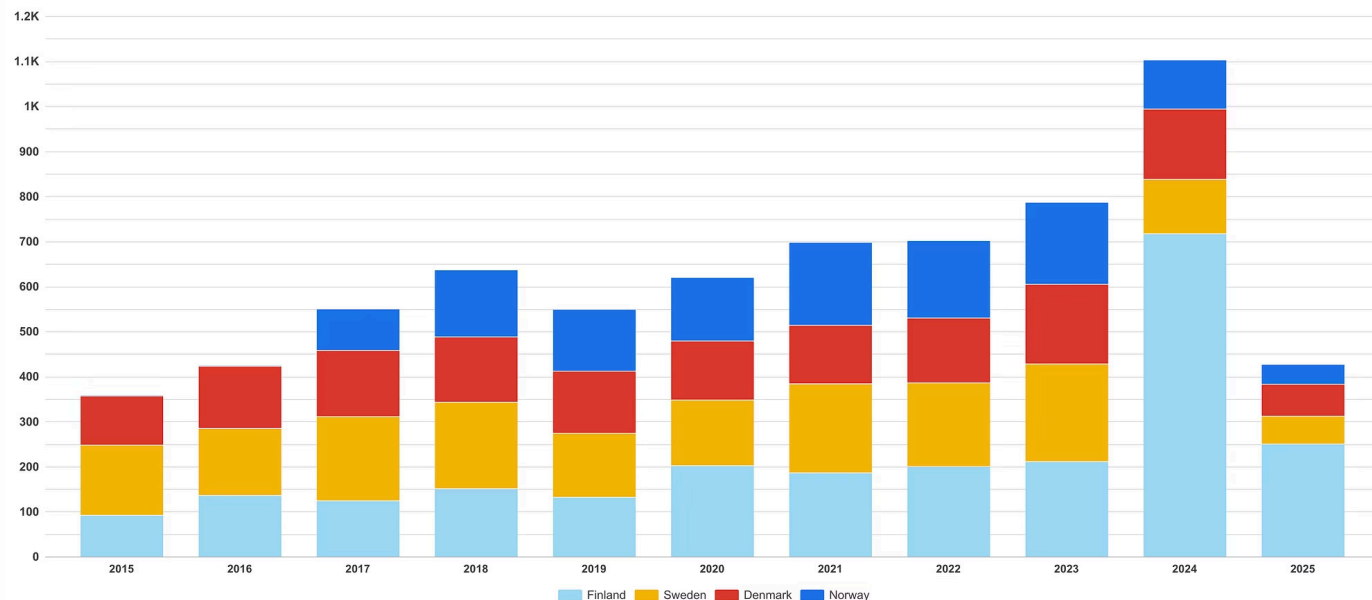
Finland presents a balanced model. It maintains a solid domestic industrial base, **awarding over 80% of its tenders (1,556 of 1,934) to Finnish suppliers**. Intriguingly, Finland is the top supplier by the *number of tenders* (1,579), surpassing all other nations. This suggests a focus on a high volume of smaller, operational, and sustainment-related contracts, which are crucial for readiness.

Norway: The Focused Buyer

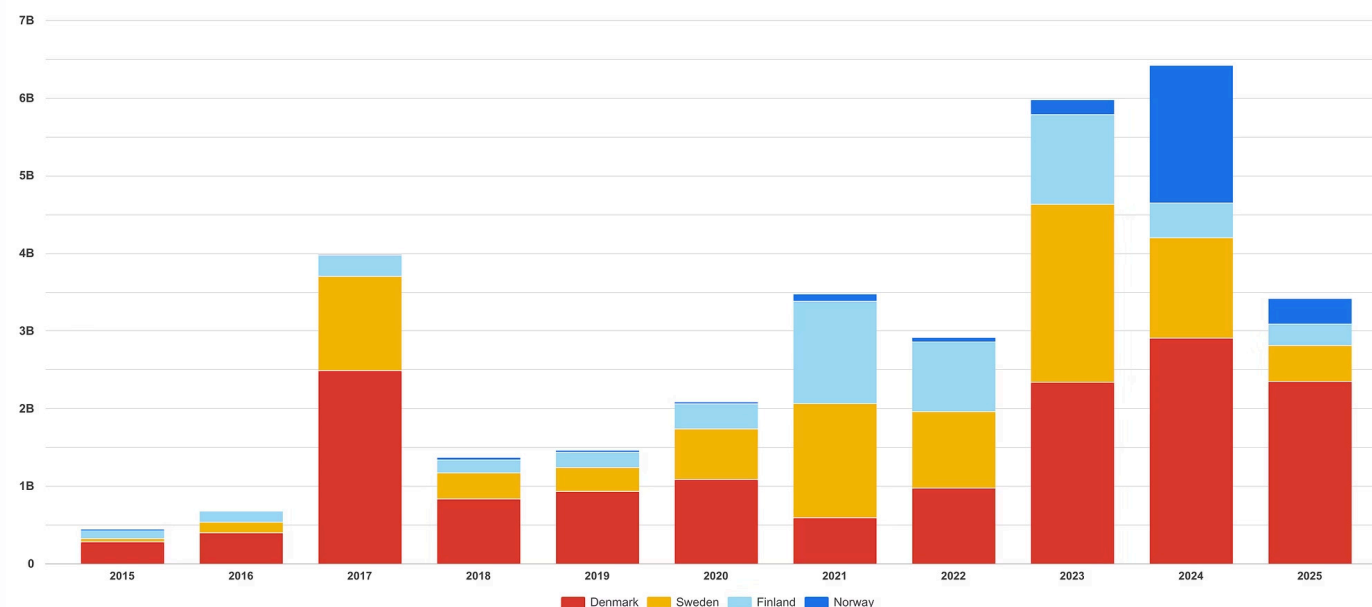
Within the public tender data, Norway's procurement is more focused, with **€1.13 billion** awarded to domestic suppliers. This domestic preference is the most pronounced in the region; **an overwhelming 95% of its tenders (188 of 198) are awarded to Norwegian firms**, leaving a minimal share for international competition. Its international purchases are smaller in scale compared to its neighbors, indicating a more selective approach to global sourcing in this tier of the market.

Interpretation: These differing patterns are not accidental; they reflect decades of distinct industrial policies and strategic priorities that continue to shape the flow of defense investment across the region.

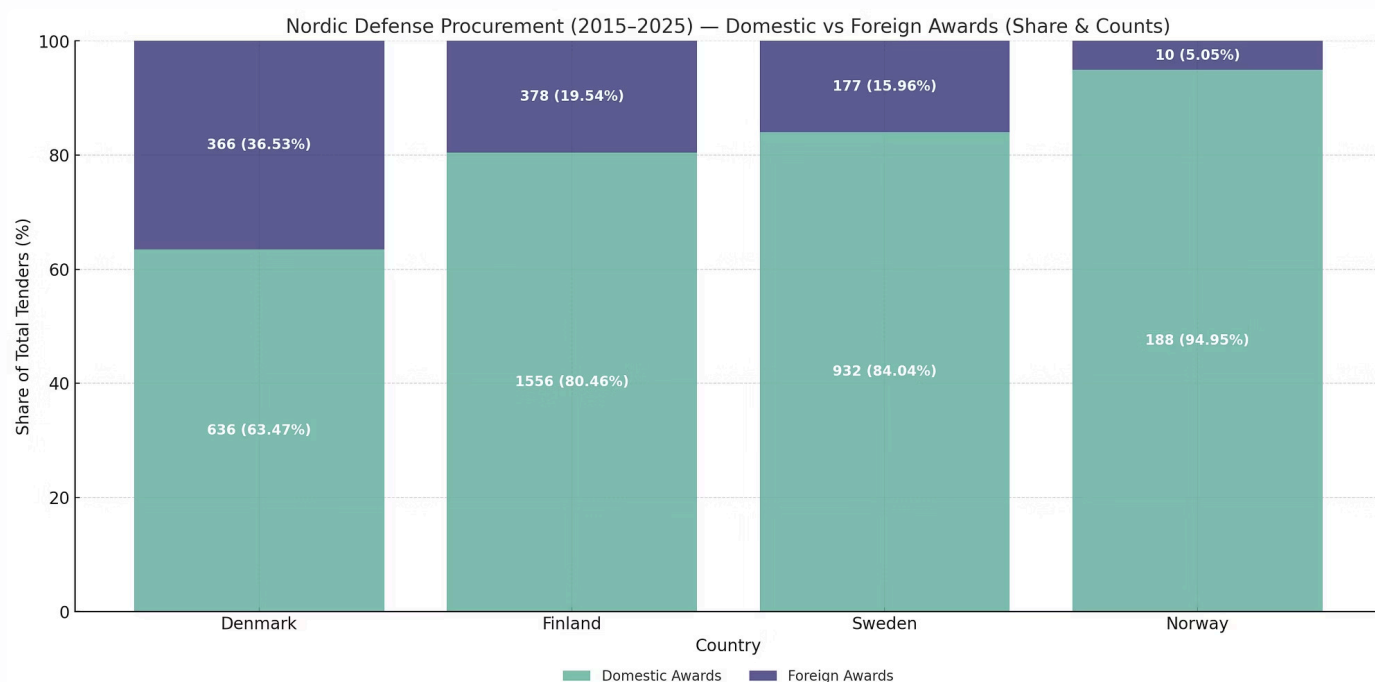
Distribution of number of tenders over time per country



Distribution of value of tenders over time per country

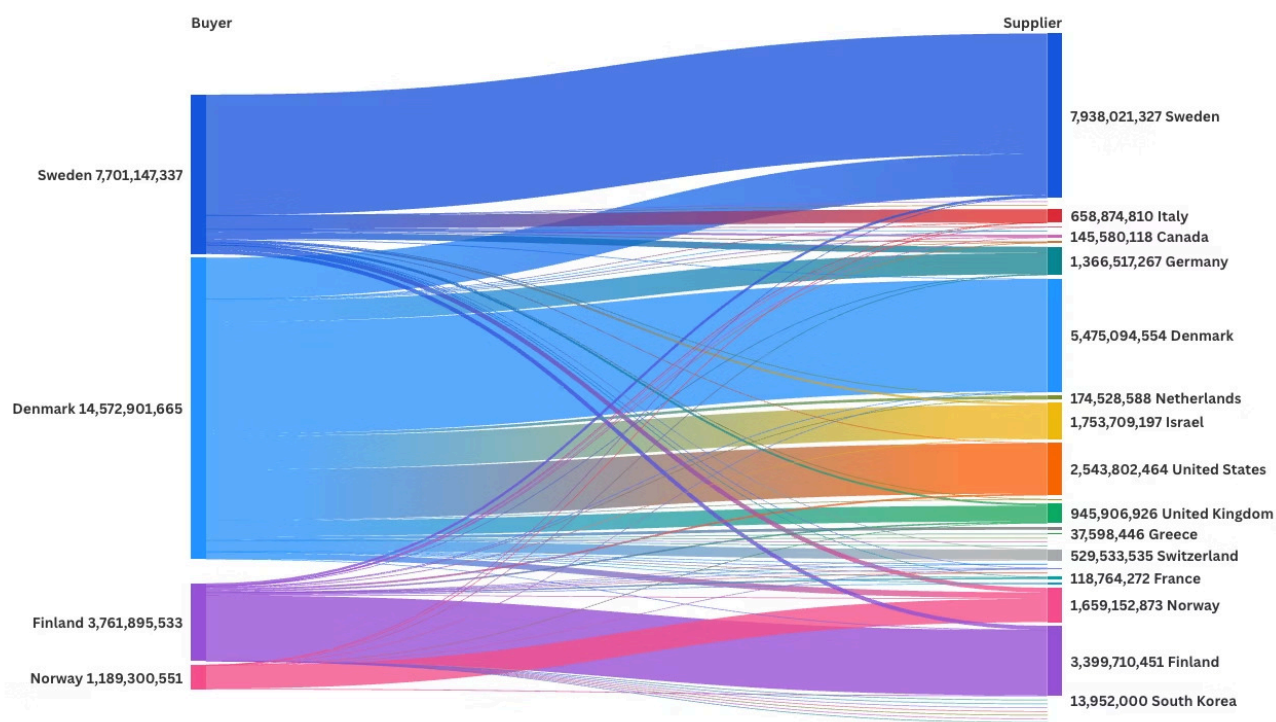


This chart set illustrates Nordic defense procurement activity over time, by both tender volume (top chart) and contract value (bottom chart) from 2015 to 2025. The charts reveal a collective upward trend in procurement activity, particularly after 2022. They also show distinct contributions from each country. Denmark, for instance, consistently accounts for a significant portion of the total value, while Finland shows a high volume of tenders, especially in 2024.



This stacked bar chart compares the share of domestic versus foreign awards by number of tenders for each Nordic country over the 2015–2025 period. It highlights the distinct national sourcing strategies, showing that Norway and Finland exhibit the highest preference for domestic suppliers, awarding 95% and 80% of their tenders to firms within their own country, respectively. In contrast, Denmark is the most international, with over a third (36.5%) of its contracts awarded to foreign suppliers.

Buyer Supplier Flow in EUR (including purchases within same country)



This Sankey diagram illustrates the flow of defense procurement spending in Euros from buyer countries (left) to supplier countries (right) within the Nordic region from 2015 to 2025. The thickness of the bands corresponds to the total contract value. The diagram shows that Sweden is the largest supplier nation, with Swedish firms winning €9.8 billion in contracts, and the majority of its procurement is sourced domestically. Denmark is the primary importer, with significant spending directed towards firms in the United States, Sweden, Israel, and Germany. Finland and Norway show a high preference for domestic suppliers in the public tender data.

5. From Insight to Action: The Nordic Supplier Discovery Tool

In addition to tender analysis, Nordic Procurement Labs has developed a robust tool to translate data insights into actionable supplier discovery. This tool enables users to input any requirement, whether defense-related or general, to find suitable suppliers within the Nordic countries that have validated experience providing products or services to the public sector.

This is crucial for broadening the base of potential suppliers for resilience and competitiveness, prioritizing Nordic countries themselves. Our tool facilitates this by providing increased visibility of suppliers across the region, a feature difficult to achieve with other platforms. The tool already includes information on over **40,000 suppliers**, incorporating the data from this report and more. To enhance trust, we display the specific contracts each supplier has won, contextualizing the amounts and detailing the products or services provided.

Powered by **Graph Retrieval Augmented Generation (Graph RAG)**, which combines advanced knowledge graphs with generative AI, the tool is designed for ease of use. Users can phrase requirements in their own words and language to receive specific, tailored recommendations.

A key aspect of the tool is its ability to identify suppliers who may not have traditionally served the defense sector but possess relevant capabilities. As this report highlights, much of what is procured are not weapon systems but technologies and services that can be sourced from civilian companies.

Furthermore, the tool supports innovative SMEs and startups, which are well-positioned to provide a competitive edge but often struggle with the demanding requirements of large defense tenders. Our platform helps these smaller companies identify and connect with prime contractors, enabling them to pitch their services and become subcontractors.

The tool is live, open and does not require registration: <https://nordic.procurementlabs.net/>

Input Requirements
Enter your specific needs in natural language, whether for defense systems or general services

Discover Suppliers
Receive tailored recommendations from a database of over 40,000 validated Nordic suppliers

Review Evidence
Examine each supplier's past contracts, including values and detailed descriptions

Connect & Collaborate
Reach out to potential partners or subcontractors to build your supply chain

Illustrative Examples

To demonstrate the tool's functionality, here are two examples of user requirements and the specific, evidence-backed supplier recommendations generated.

Example Requirement 1: "Radio equipment that supports encryption and can be operated outdoors under all conditions."

SAMPLE RESULTS:

Matched Suppliers

These suppliers match your description and have verified public sector experience, including awarded tenders. Use the search box above to refine or adjust your results.

SA

Swedish Radio Supply i Wermland Aktiebolag

Box 208, Sweden

Why this supplier?

Supplier specializes in Rakel radio communication products with proven contracts in Sweden for radio equipment and support, demonstrating rugged, secure communication solutions for emergency and field operations under diverse conditions.

Excellent Fit

Evidence & Credentials

✓ Rakel radio communication products

✓ Proven emergency comms contracts

✓ Support and installation services

Access Evidence

Contact Supplier

Recent tender wins:

Swedish Transport Administration (Trafikverket)2021

Support and Configuration of Rakel Equipment, and Purchase of Accessories

Support and configuration services for Rakel communication equipment, including procurement of related accessories.

Contract Value10,200,000 SEK

National Procurement Services Centre at Kammark...2017

Rakel Equipment as Product and Service

Lot 2

Framework agreement for Rakel terminals, accessories for Rakel equipment, and various related services. The agreement is available for use by government agencies under the Swedish government, parliament, and other publicly controlled bodies as

Contract Value50,000,000 SEK

National Procurement Services Centre at Kammark...2021

Rakel Equipment

Lot 8: Other Radio Communication

Procurement covering two sub-areas: Rakel products and services, and other radio communication. Suppliers could bid for one or both sub-areas. Primarily deliveries to customers in Sweden.

Contract Value172,500,000 SEK

SA

SIEB Teknik ApS

Holmagervej 1L, Denmark

Why this supplier?

Supplier offers handheld radios for military and emergency use in diverse environments including ATEX zones, with proven integration and support services. Contract evidence with Danish Ministry of Defence confirms capability. Lacks explicit mention of integrated encryption and battery specs.

Strong Fit

Evidence & Credentials

✓ Military-grade handheld radios

✓ Integration and support services

✓ Danish Ministry of Defence contract

Access Evidence

Contact Supplier

Recent tender wins:

Danish Ministry of Defence Acquisition and Logistic...2022

Handheld Radios and Accessories

Lot 1

The procurement concerns handheld radios and accessories for the Danish Defence.

Contract Value7,000,000 DKK

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Example Requirement 2: "Underwater sensor technologies that could be suitable to detect unmanned submarine drones."

SAMPLE RESULTS:

AO

+

ATLAS ELEKTRONIK FINLAND OY

Lars Sonckin kaari 16, Finland

Why this supplier?

Supplier offers maritime radar, sonar, and communication equipment with proven maritime surveillance and target identification capabilities, relevant to underwater sensor needs. Finnish defense contract evidence supports credibility. Minor gaps in explicit mention of magnetic anomaly detectors and autonomous sensor nodes.

Evidence & Credentials

Maritime radar and sonar equipment

Maritime surveillance and target ID

Finnish defense contract evidence

Access Evidence

Contact Supplier

Recent tender wins:

Finnish Defence Forces

2023

Seafox-C Clearance Charges Procurement

Lot 1

Procurement of Seafox-C clearance charges as a direct contract exceeding the EU threshold.

Contract Value

€852,500

AO

+

Arwell Tekniikka Oy

Maskuntie 226 B, Finland

Why this supplier?

Supplier offers advanced hydroacoustic and side scan sonar systems with proven integration and installation experience, suitable for underwater object detection but lacks specific evidence for magnetic anomaly detection and autonomous sensor nodes.

Evidence & Credentials

Multibeam echo sounders

Side scan sonar systems

Hydroacoustic system integration

Access Evidence

Contact Supplier

Recent tender wins:

Finnish Environment Institute (Suomen ympäristök...

2019

Expansion and Upgrade of Hydroacoustic Research Systems for Research Vessel Aranda

Side Scan Sonar System for Research Vessel Aranda

The overall objective of this procurement is to significantly improve the hydroacoustic research capabilities onboard the research vessel to meet contemporary standards. The systems should provide detailed information on sunken objects potentially

Contract Value

€82,370

i

Tool Benefits for Defense Procurement

- Identifies qualified suppliers across all Nordic countries
- Provides evidence of past performance through contract history
- Discovers dual-use technology firms with relevant capabilities
- Supports SMEs in finding prime contractor opportunities
- Enhances supply chain resilience through broader supplier awareness

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6. Implications for Policy and Industry

The data-driven findings of this report offer clear, actionable insights for both private sector stakeholders and government policymakers. The Nordic defense market is not a monolith; it is a complex ecosystem of distinct national priorities undergoing a historic, collective transformation.

For Industry Stakeholders: A Market of Nuanced Opportunities

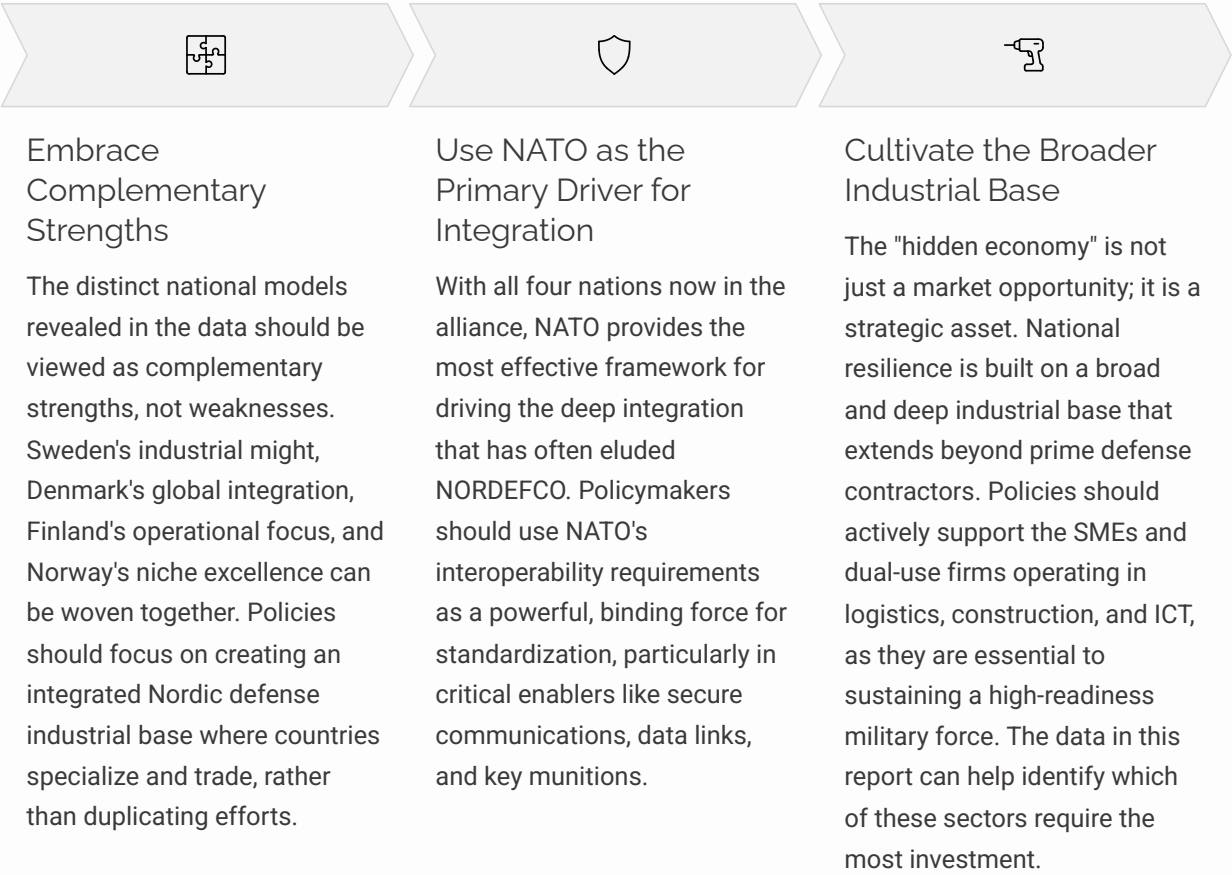
The post-2022 spending surge has created a significant and growing market, but a one-size-fits-all "Nordic" strategy is unviable. Success requires a tailored approach:

1. **Navigate the National Models:** Our data confirms that each country has a unique procurement culture.
 - In **Sweden**, the market is dominated by domestic champions. The most effective strategy for foreign firms is often partnership and subcontracting, offering niche technologies that integrate into larger Swedish-led systems.
 - **Denmark** represents the most open market for international competition. Success here depends on demonstrating clear value, NATO interoperability, and an understanding of a politically transparent procurement process.
 - In **Finland**, the high volume of tenders points to a constant need for operational and sustainment support. For major programs, offering substantive industrial participation that enhances Finland's security of supply is critical.
 - **Norway's** focused approach means opportunities are often concentrated in specific strategic areas. Aligning with its national industrial strategy and partnering with key players like Kongsberg or Nammo is a proven path to success.
2. **Target the "Hidden Economy":** The largest volume of opportunities is not in major weapons platforms but in the foundational categories of **construction, ICT, logistics, and services**. This is the most accessible entry point for SMEs and dual-use technology firms. The surge in logistics tenders, for example, signals a massive and immediate need for mobility and sustainment solutions that commercial firms are well-placed to provide.



For Policymakers: Leveraging the Nordic Bloc

The data provides an evidence base for smarter, more collaborative policy that can enhance the collective strength and resilience of the Nordic region.



Current State: Fragmented Approaches

- Strong domestic preferences limiting cross-border collaboration
- Duplicated capabilities across countries
- Limited visibility of potential suppliers in neighboring countries
- Underutilized collective purchasing power

Future Vision: Integrated Nordic Defense Base

- Coordinated specialization based on national strengths
- Increased cross-border procurement and industrial partnerships
- Shared supplier discovery and qualification
- Joint development of critical capabilities

The data clearly shows that while individual Nordic countries may pursue different procurement strategies, their collective potential remains significantly untapped. By leveraging complementary strengths and deepening integration, the Nordic region can achieve greater security and economic benefits than any single nation could accomplish alone.

7. The Path Forward: Towards a Living Baseline

This report is a first step. Our goal is to transform this analysis from a static snapshot into a living intelligence baseline for the region. The interactive dashboard and the supplier discovery tool are key components of this effort. Future releases will address known data limitations and add new analytical depth.

Data Upgrades

Full normalization of buyer and supplier entities will allow for a more precise quantification of domestic preference. Geo-resolution of addresses will map industrial clusters, and AI-assisted classification will identify emerging capability areas like drones and cyber.

New Analytics

Deeper analysis of cross-border trade flows, the technological sophistication of procurement, and integration with other datasets (such as the European Defence Fund) will connect R&D funding with contract awards, providing a more holistic view of the innovation ecosystem.

Get Involved

We welcome feedback, data contributions, and collaboration opportunities from industry stakeholders, policymakers, and researchers. Contact us at contact@procurementlabs.org to discuss how you can participate in this ongoing effort to enhance Nordic defense capabilities through data-driven insights.

References

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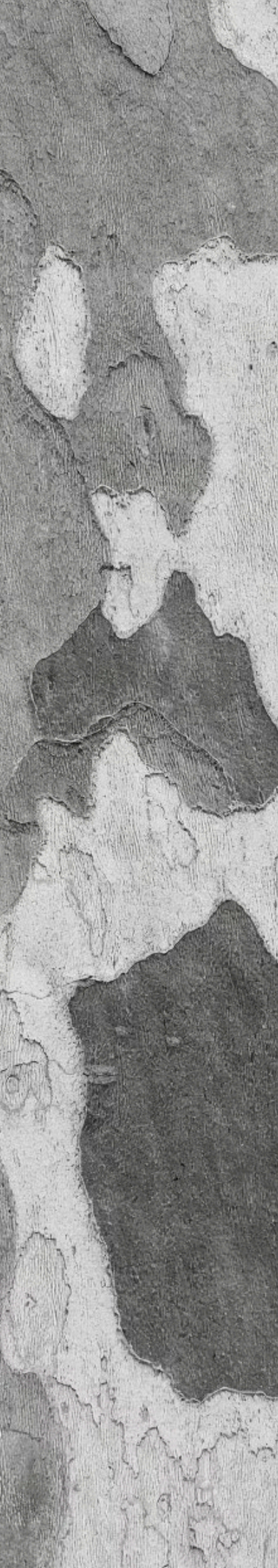
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Appendixes:

A) Methodological Notes

Analytical Guidance

1. **Focus on Trends:** It is best to use this data to compare proportions and trends over time rather than making direct, absolute comparisons of contract values between countries, as publication practices can vary.
2. **Category Values:** A single tender can be tagged with multiple procurement codes, which may lead to double-counting in category value totals. Tender counts and percentage shares provide a more stable basis for comparison.
3. **Directional Flows:** Buyer-supplier country totals reflect the awards recorded in TED for that specific corridor, not the complete bilateral defense trade relationship.

Strengths and Limitations

- **Strengths:** This bottom-up approach offers a granular and transparent view of the market, revealing real entry points for SMEs and enabling a consistent comparison of procurement trends over time.
- **Limitations:** The analysis is subject to the inherent biases of the TED data. It only includes contracts above EU thresholds and excludes classified programs. Reported contract values can be estimates, and entity names are not yet fully harmonized, meaning company-level market share analysis should be considered directional.

Data Interpretation Caution

The TED database captures only a portion of total defense spending. The "capture ratio" varies significantly between countries (from 2.3% for Norway to 27.1% for Denmark on average), which means direct value comparisons between countries should be made with caution. Focus instead on proportional analysis and trends over time within each country.

B) Definitions of the nine division groups illustrating the presented purchasing categories.

Agriculture & Food

This group covers the entire agricultural and food production chain.

- **Raw Agricultural Products:** Encompasses goods derived directly from farming, fishing, and forestry, including crops, cereals, vegetables, fruit, meat, animal products, and logging products.
- **Processed Food & Beverages:** Includes a wide range of manufactured consumables such as meat products, dairy items, oils and fats, grain mill products, animal feedstuffs, miscellaneous food products, and beverages (alcoholic and non-alcoholic).
- **Agricultural Machinery:** Covers specialized equipment for agricultural and forestry use, such as tractors, soil preparation machinery (ploughs, harrows), harvesting machinery, and related parts.
- **Farming & Husbandry Services:** Comprises services related to agricultural production, including animal husbandry, horticulture, aquaculture, apiculture (beekeeping), forestry management, and other support services.

Energy & Raw Materials

This category focuses on the extraction, provision, and processing of energy and basic raw materials.

- **Energy Sources & Fuels:** Includes petroleum, coal, and gaseous fuels, as well as the provision of electricity, heating, and energy from solar and nuclear sources.
- **Mined & Quarried Products:** Covers materials obtained from mining and quarrying, such as metal ores, basic metals, sand, clay, chemical and fertilizer minerals, and salt.
- **Oil & Gas Industry Services:** Encompasses specialized professional and technical services for the oil and gas sector, including drilling, rig-positioning, pipeline inspection, and other onshore and offshore support operations.

General Goods & Services

A broad category covering a diverse range of public services and consumer goods not classified elsewhere.

- **Personal & Domestic Goods:** Includes clothing, footwear, luggage, furniture, domestic appliances, lighting, cleaning products, and printed materials like books and newspapers.
- **Public Utilities & Real Estate:** Covers the distribution of water, gas, and electricity, along with services related to the sale, rental, and management of real estate.
- **Health & Social Services:** Encompasses a wide array of human health services (hospital, medical, dental), veterinary services, and social work services.
- **Repair, Cleaning & Environmental Services:** Includes repair and maintenance for vehicles, equipment, and buildings, as well as services for sewage, refuse collection, sanitation, and environmental protection.
- **Hospitality, Recreational & Cultural Services:** Comprises services from hotels, restaurants, and retailers, as well as recreational, cultural, and sporting services.

Defence & Security

- Military Equipment & Systems

This cluster covers the physical hardware, platforms, and advanced systems used directly by military forces.

- **Weaponry & Ammunition:** This includes a range of **firearms**, miscellaneous weapons, and the corresponding **ammunition** and associated parts.
- **Military Platforms:** This covers the primary combat and transport vehicles across all domains, including **armoured military vehicles, warships, military aircraft, missiles**, and military spacecraft, along with all their associated parts.
- **Advanced Electronic & Combat Systems:** This pertains to the sophisticated technology for modern warfare, such as:
 - **Command, control, communication, and computer (C4S)** systems.
 - **Intelligence, surveillance, target acquisition, and reconnaissance (ISTAR)** platforms.
 - **Electronic warfare systems** and countermeasures.
 - **Battle simulators** for training.
- **Personnel & Support Equipment:** This includes all **individual equipment** for soldiers as well as the general **support equipment** required for military operations.

- Military Services

This cluster is narrowly focused on the services directly related to national defence operations and strategy.

- **Defence Services:** This encompasses the core services related to military defence, distinct from civil law enforcement, public administration, or social security functions.

Industrial & Construction

This category covers the products and services for the construction and industrial manufacturing sectors.

- **Industrial & Construction Machinery:** Encompasses heavy machinery for production, mining, and construction, including machine tools, lifting and handling equipment, and earthmoving machinery.
- **Construction Materials & Structures:** Includes a wide range of raw materials (stone, metals) and fabricated products used in construction, such as pipes, cables, tanks, and structural components.
- **Construction & Installation Work:** Covers the full scope of building and civil engineering works, from site preparation to building completion, as well as the installation of electrical and mechanical equipment.
- **Professional & Technical Services:** Includes services such as architecture, engineering design, urban planning, construction supervision, and technical testing and analysis.

Professional Services

This group focuses on knowledge-based, corporate, and social support services.

- **Financial & Insurance Services:** Covers banking, investment, brokerage, portfolio management, insurance, and pension fund services.
- **Business & Management Services:** Encompasses a wide array of corporate support, including legal advisory, accounting, marketing, management consulting, recruitment, and office-support services.
- **Research & Development:** Includes the execution of research and experimental development across various fields, as well as related consultancy services.
- **Education & Training:** Covers all levels of education from primary to higher education, as well as adult, vocational, and specialist training programs.

Medical & Laboratory

This group encompasses specialized products for scientific, medical, and laboratory applications.

- **Chemical Products:** Includes industrial gases, dyes, pigments, basic inorganic and organic chemicals, fertilizers, plastics in primary forms, and explosives.
- **Medical & Pharmaceutical Products:** Covers a wide range of medical and dental equipment, imaging devices, surgical instruments, pharmaceuticals, and personal care items.
- **Precision & Laboratory Equipment:** Encompasses a variety of instruments for measurement, testing, and analysis, including navigational, meteorological, optical, and laboratory equipment.

ICT

This category covers all aspects of Information and Communication Technology.

- **Hardware & Equipment:** Includes office machinery, computing equipment (servers, PCs), and a full range of telecommunications and broadcasting equipment, such as network hardware and mobile phones.
- **Software & Information Systems:** Encompasses all types of software packages, including industry-specific, networking, productivity, and operating systems, as well as complete information systems and servers.
- **IT & Communications Services:** Covers a broad spectrum of services, including IT consulting, custom software development, data processing, internet support, and telecommunications, postal, and courier services.

Transportation & Logistics

This category relates to the equipment and services for moving people and goods.

- **Transport Equipment & Parts:** Includes all types of vehicles (motor vehicles, motorcycles, ships, boats, railway locomotives, aircraft) and their associated mechanical parts, engines, and accessories.
- **Transport Services:** Covers the operation of passenger and freight transport across all modes: road, rail, air, and water, including public transport and non-scheduled hire.
- **Supporting & Auxiliary Services:** Encompasses logistical operations that support transport, such as cargo handling, storage and warehousing, pipeline transport, and the services of travel agencies and tour operators.

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