



NATO AND NSPA ADAPTATION TO THE NEW REALITY

September 2025

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SPEAKING POINTS



- **A new security environment**
- **NATO's efforts to adapt to the new reality**
- **NSPA**
- **Support to Operations Directorate**
- **Conclusion**

WHO I AM

Government



Industry



International Organization

International Cooperation



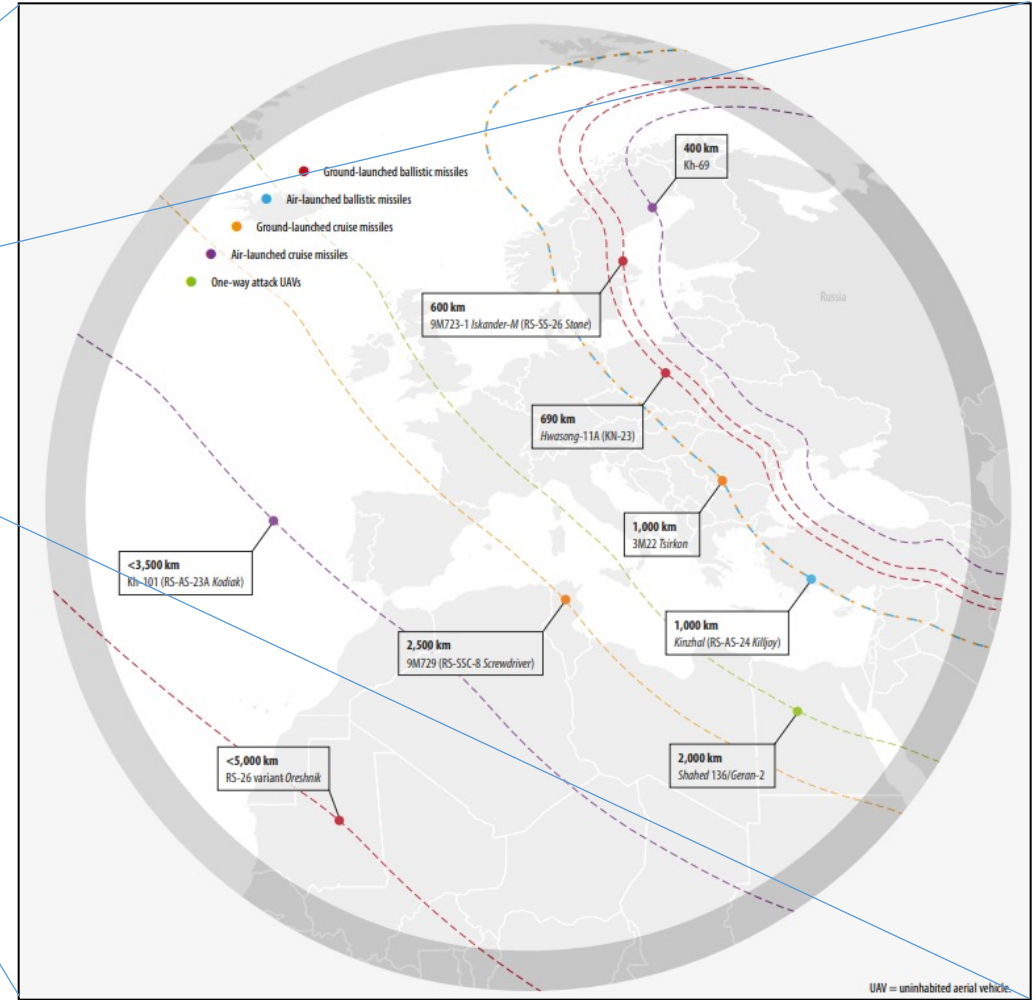
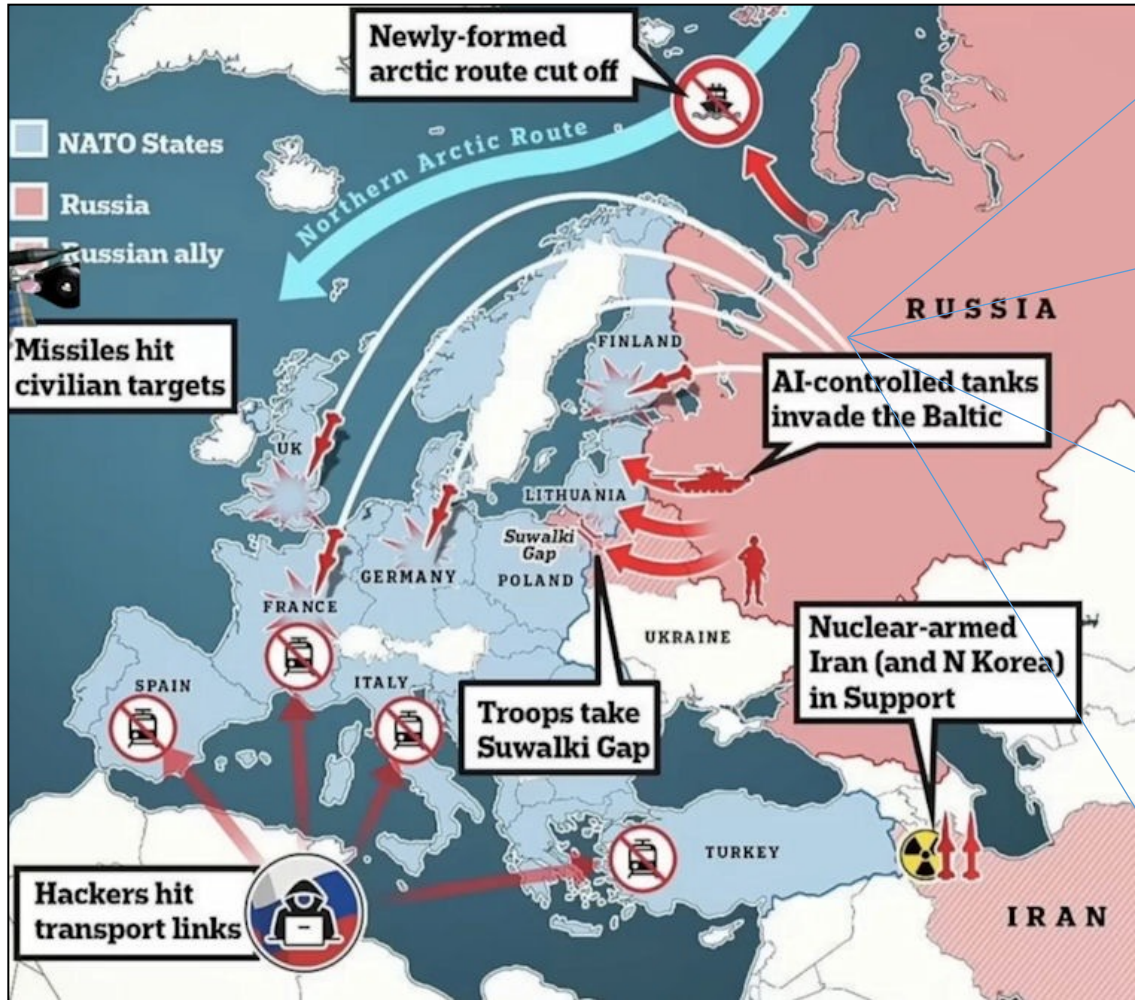
Ammunition

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A NEW SECURITY ENVIRONMENT



NATO'S ADAPTATION



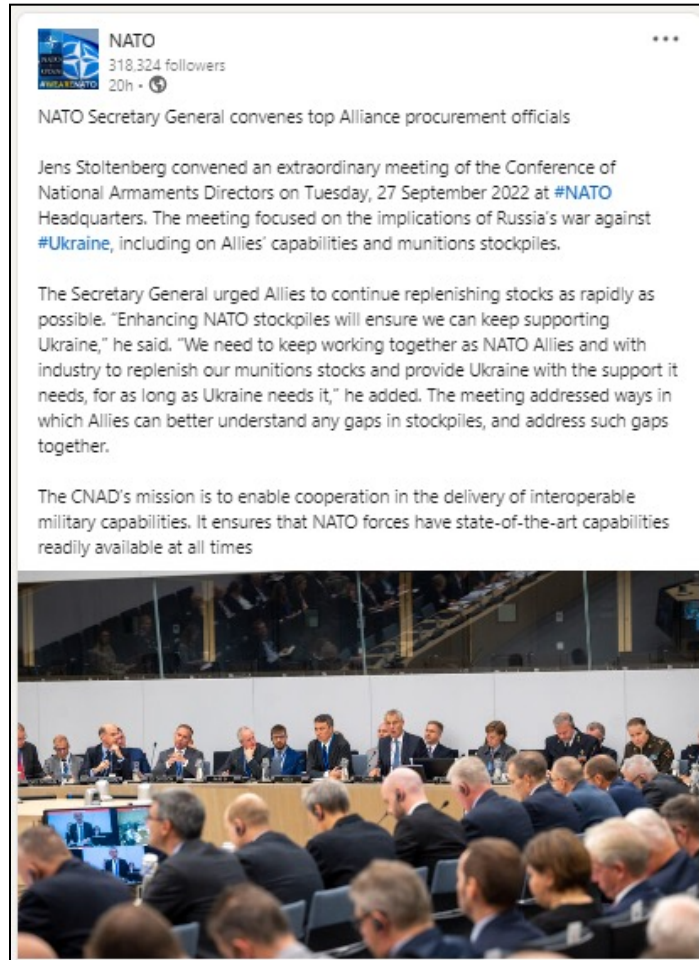
The international environment has changed since 2022

- War in Ukraine
- Israel-Gaza Conflict
- SWE and FIN joined NATO

NATO is adapting to this new reality

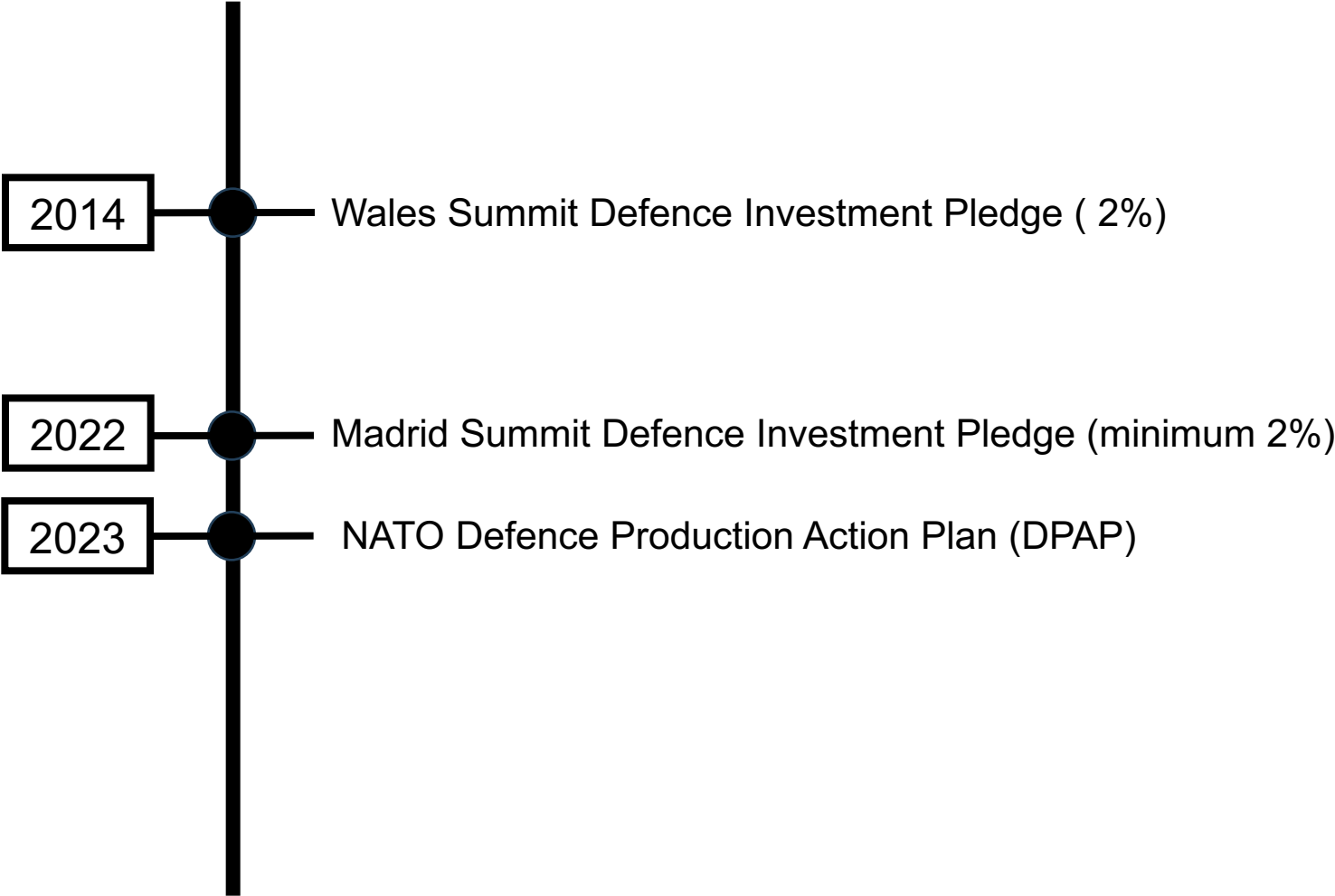
- Defense Investment Pledge has substantially increased
- Deterrence and Defence posture has been strengthened
- NATO Force Structure has scaled up
- NATO Command Structures has adapted
- Logistics has evolved

2022 – CNAD TOP ALLIANCE PROCUREMENT OFFICIALS



***“We need to keep working together as NATO Allies and with industry to replenish our munitions stocks”,
NATO Secretary General***

HEADS OF STATES DEFENCE INVESTMENT PLEDGES



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2023: NATO DEFENSE PRODUCTION ACTION PLAN (DPAP)



Agreed at the Vilnius Summit in July 2023 to enable the Alliance to bolster engagement with the defence industry

- Identifying ways to rapidly and effectively **aggregate demand** through multinational cooperation and more agile procurement including by making use of NATO's High Visibility Projects,
- Understanding and **addressing defence industrial challenges** and capacity to support defence planning
- Increasing interoperability and **interchangeability**, with an initial focus on land battle-decisive munitions

*"We are committed to leveraging the Alliance's role as a convener, standard-setter, requirement-setter and **aggregator**, and delivery enabler to promote sustainable defence industrial capacity",*

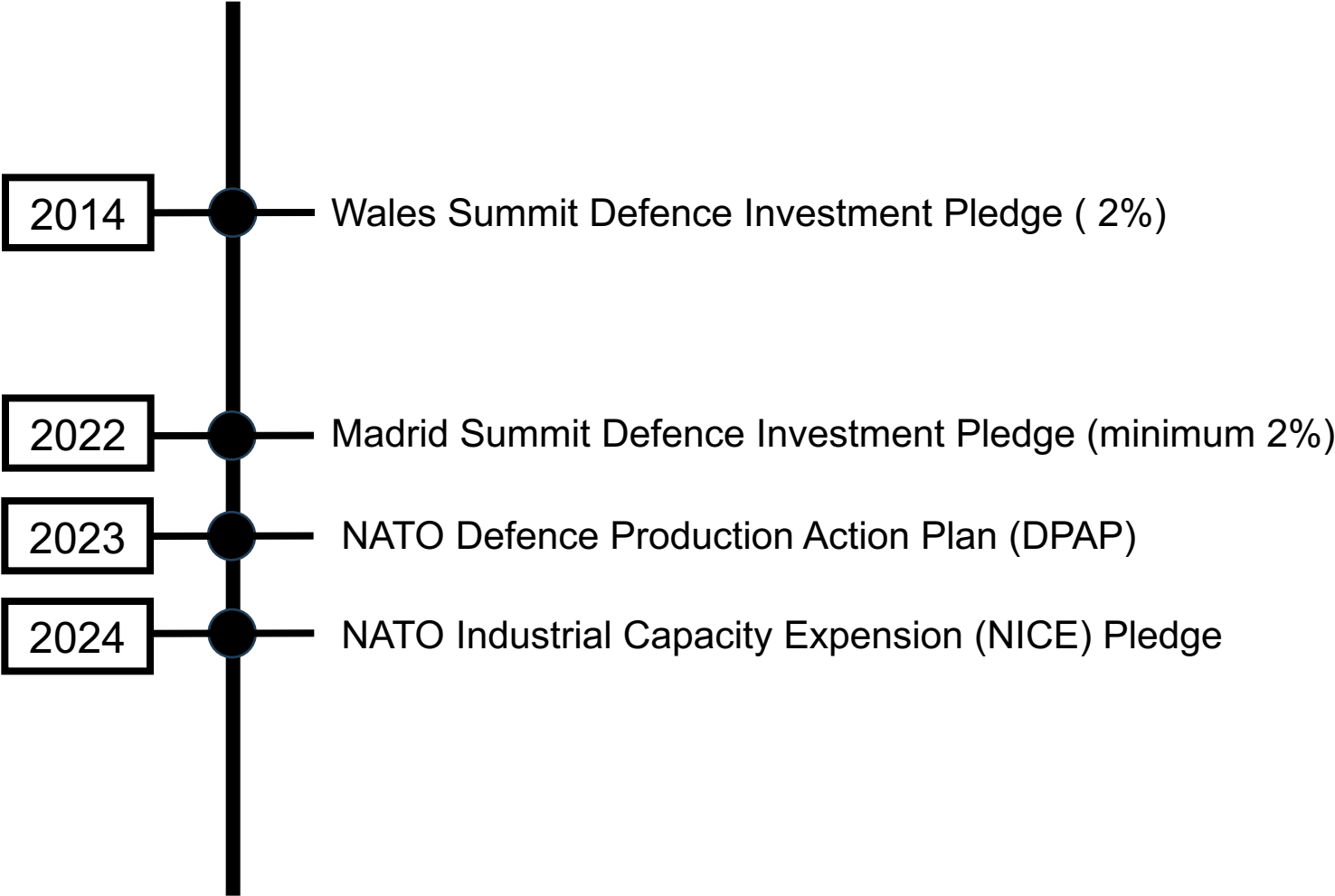
NATO Heads of State and Government



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HEADS OF STATES DEFENCE INVESTMENT PLEDGES



2024: NATO INDUSTRIAL CAPACITY EXPANSION PLEDGE

“We pledge to Strengthen defence industry across the Alliance. Provide a clear demand signal to industry through firm orders and contracts, increasing multiyear buys and sharing appropriate information on our key requirements”,
NATO Heads of State and Government



**NATO Washington
Summit**

“We pledge to Increase large scale, multinational procurement (...) Joint procurement is at the heart of bolstering interoperability and interchangeability and delivers better value for money. Seek to make greater use of existing, tried and tested frameworks, including those offered by the NATO Support and Procurement Agency (NSPA).”
NATO Heads of State and Government

HEADS OF STATES DEFENCE INVESTMENT PLEDGES

(...) protect critical infrastructure, defend networks, ensure civil preparedness and resilience, innovate, and strengthen the defence industrial base (...)



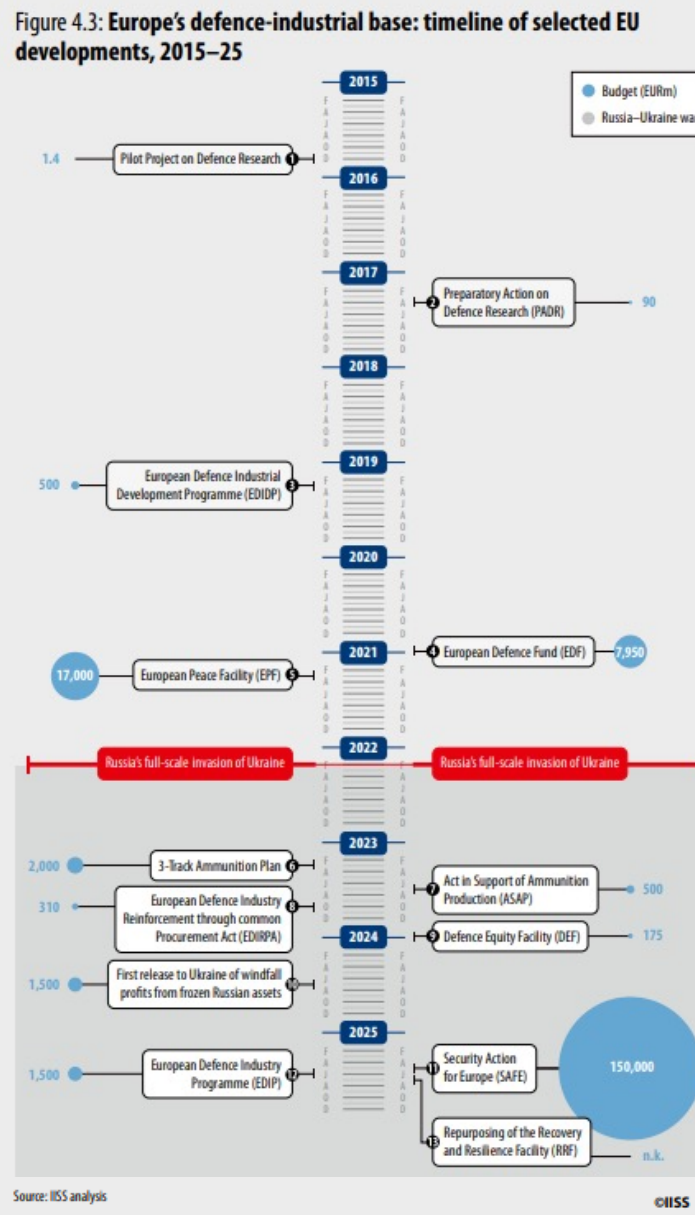
2025 - EU REARM 2030



800 BEUR
2030 ReARM
plan



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6 times more than 2 years ago
2 million shells by end 2025

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2025 - SECURITY ACTION FOR EUROPE (SAFE)

Tentative allocation per Member State

The tentative allocation per Member State is as follows:

 Belgium €8,340,027,698	 Bulgaria €3,261,700,000	 Croatia €1,700,000,000	 Cyprus €1,181,503,924
 Czechia €2,060,000,000	 Denmark €46,796,822	 Estonia €2,660,932,171	 Finland €1,000,000,000
 France €16,216,720,524	 Greece €787,669,283	 Hungary €16,216,720,524	 Italy €14,900,000,000
 Latvia €5,680,431,322	 Lithuania €6,375,487,840	 Poland €43,734,100,805	 Portugal €5,841,179,332
 Romania €16,680,055,394	 Slovakia €2,316,674,361	 Spain €1,000,000,000	

Category 1

- Ammunition and missiles
- Artillery systems, including deep precision strike capabilities
- Ground combat capabilities and their support systems, including soldier equipment and infantry weapons
- Small drones (NATO class 1) and related anti-drone systems
- Critical infrastructure protection
- Cyber
- Military mobility including counter-mobility

Category 2

- Air and missile defence systems
- Maritime surface and underwater capabilities
- Drones other than small drones (NATO class 2 and 3) and related anti-drone systems
- Strategic enablers such as, but not limited to, strategic airlift, air-to-air refueling, C4ISTAR systems as well as space assets and services
- Space assets protection
- Artificial intelligence and electronic warfare



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EVOLUTION OF NATO FORCE STRUCTURE (NFS)



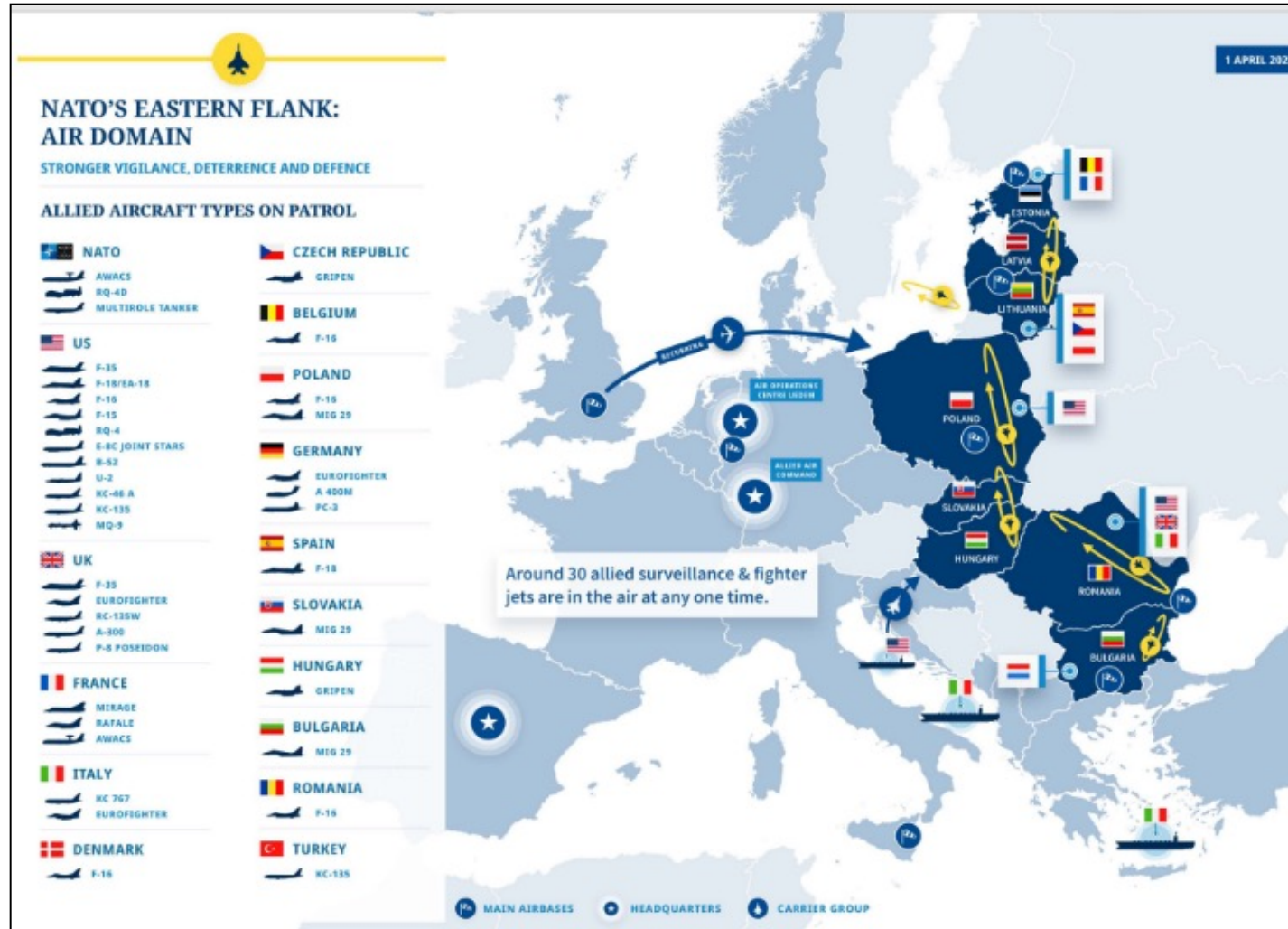
2014

NATO Summit Wales – Enhanced NRF & Very High Readiness Joint Task Force (VJTF)

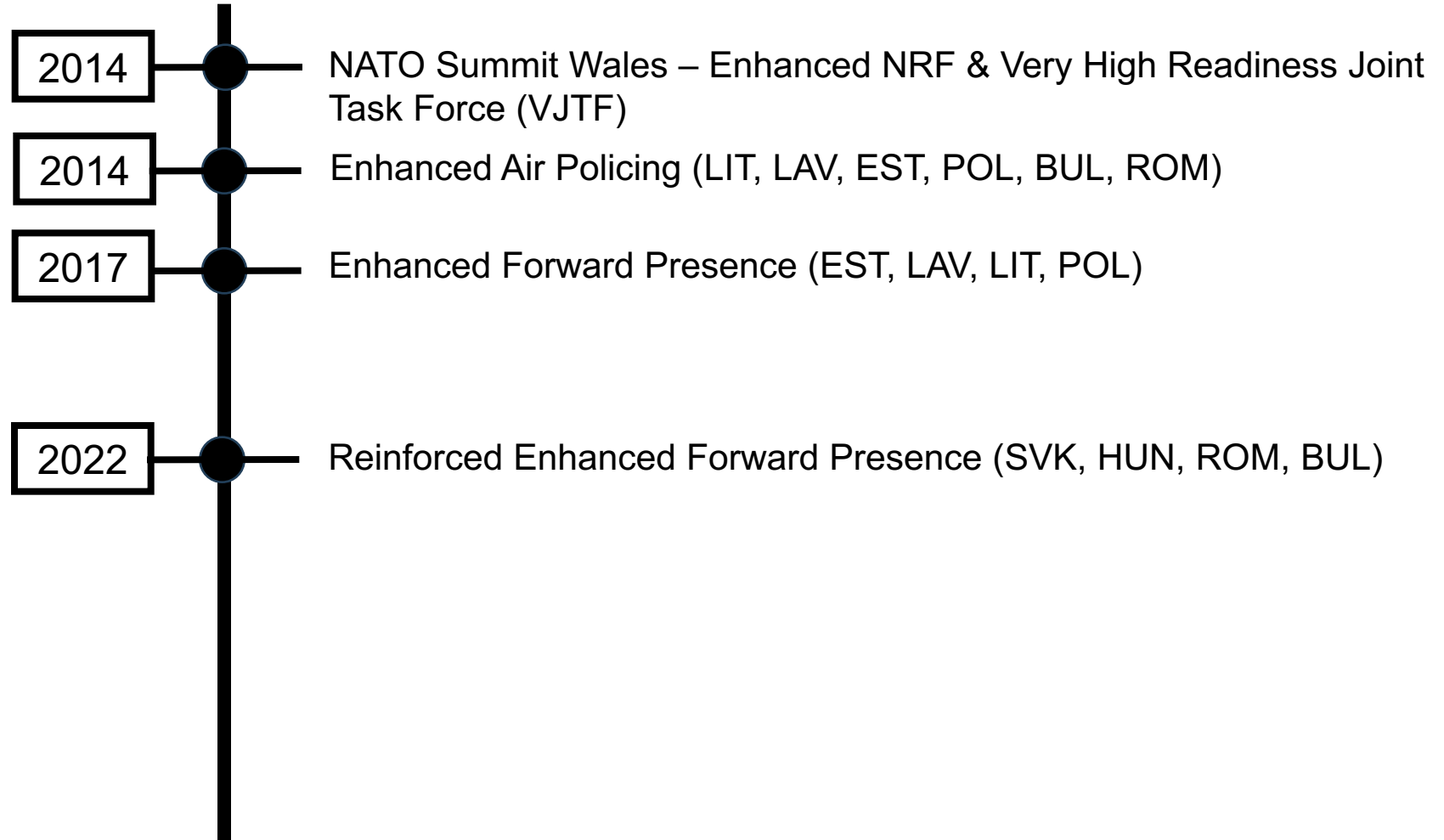
2014

Enhanced Air Policing (LIT, LAV, EST, POL, BUL, ROM)

2014 – ENHANCED AIR POLICING



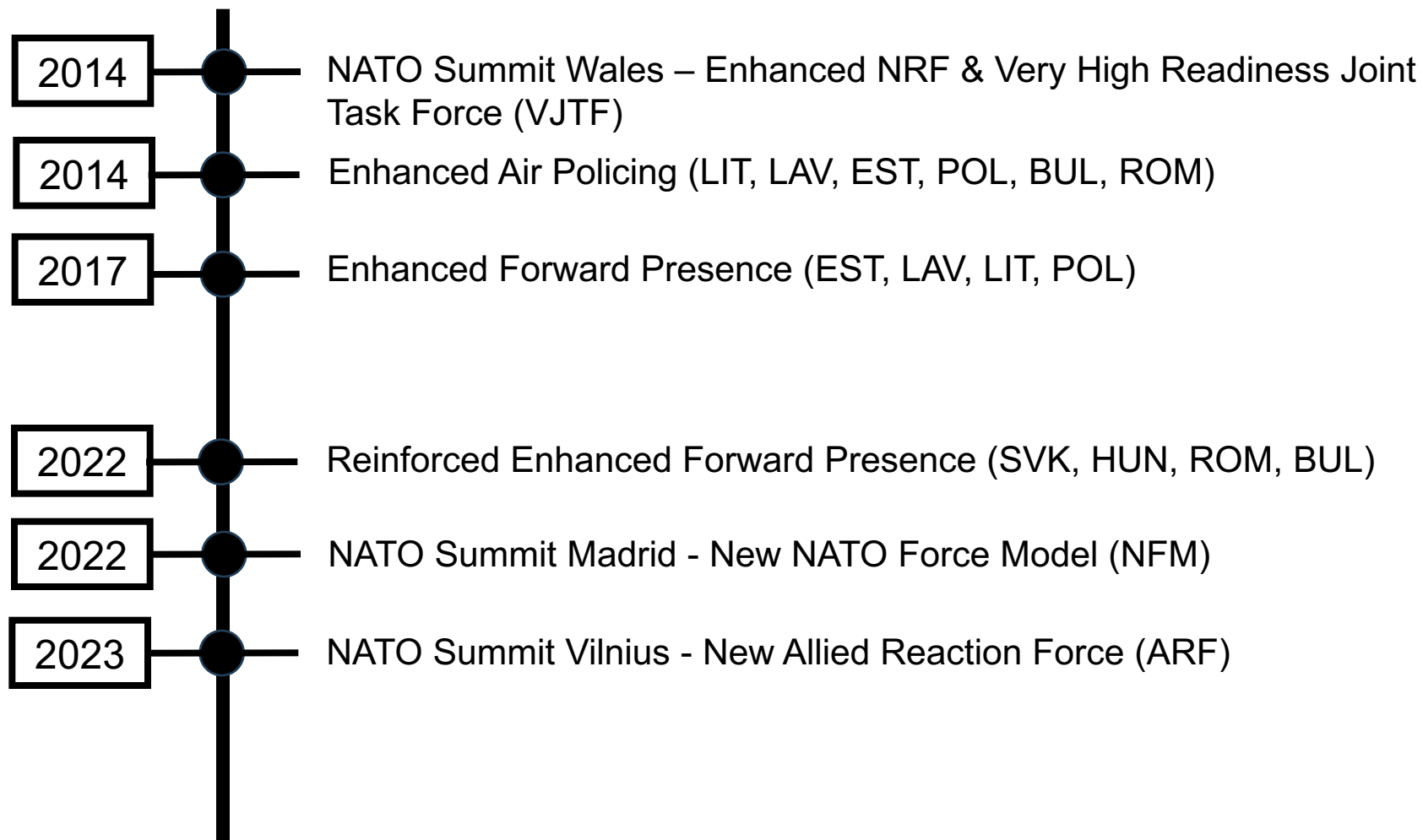
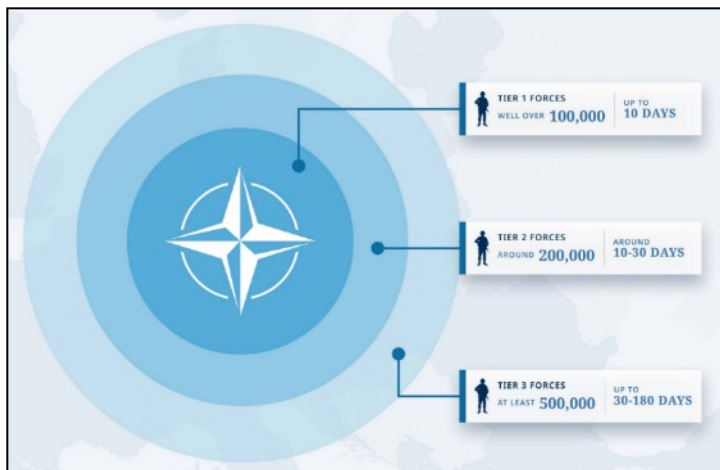
EVOLUTION OF NATO FORCE STRUCTURE (NFS)



2022 – REINFORCED ENHANCED FORWARD PRESENCE



EVOLUTION OF NATO FORCE STRUCTURE (NFS)



NATO FORCE AND COMMAND

Nato has expanded its military presence across Europe

Locations of Nato forces and key headquarters



EVOLUTION OF NATO FORCE STRUCTURE (NFS)



WHO WE ARE



“NSPA is a key enabler of NATO’s collective strength. It pools and shares requirements, delivers multinational acquisition programmes, and engages with defence industries to harmonize procurement. By fostering such collaboration, NSPA also strengthens European defence at a critical time and ensures that it complements NATO's efforts while maintaining full interoperability”

**NATO Secretary General Mark Rutte,
September 2025**



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WHO WE ARE



**We are the lead organisation
for multinational acquisition, support and sustainment
to the 32 NATO Nations and NATO Command Structure
in all domains**

ACQUISITION

SUPPORT

SUSTAINMENT

AIR



LAND



MARITIME



CYBER



SPACE



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WHERE WE ARE

● MAIN SITES

LUXEMBOURG

Capellen
NSPA HQs

FRANCE

Versailles
CENTRAL EUROPE
PIPELINE SYSTEM
(CEPS) PROGRAMME

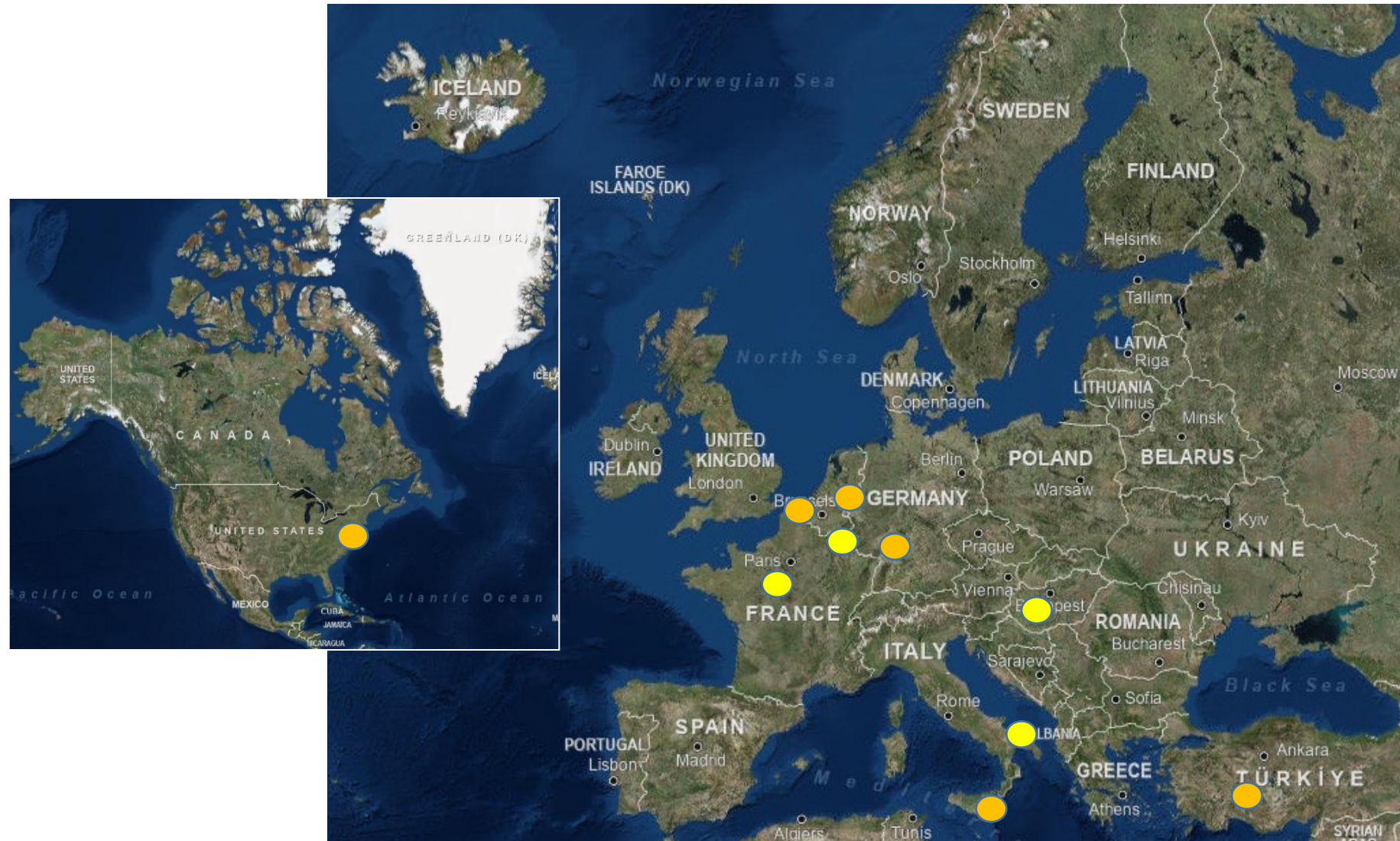
HUNGARY

Pápa
NATO AIRLIFT
MANAGEMENT (NAM)
PROGRAMME

ITALY

Taranto
SOUTHERN
OPERATIONAL
CENTRE (SOC)

● PROGRAMMES AND LIAISON



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23

OUR (43) COMMUNITIES / SUPPORT PARTNERSHIPS

AVIATION & UNCREWED AERIAL SYSTEMS

- Alliance Ground Surveillance (AGS)
- Fixed Wing Aircraft
- Helicopters
- MQ-9 International Cooperation (MIC)
- Multinational Multi Role Tanker Transport (MRTT)
- NATO Flight Training Europe (NFTE)
- Next Generation Rotorcraft Capability (NGRC)
- Uncrewed Aerial Systems (UAS)

SPECIALISED

- Common Item Materiel Management (COMMIT)
- Global Positioning System (GPS)
- Medical
- Naval Logistics Support Partnership (NLSP)
- NSPA Routing Hub (NRH)
- Operational Logistics Support Partnership (OLSP)
- **Security Cooperation Support Partnership (SCSP)**
- Strategic Airlift International Solution (SALIS)

LAND COMBAT

- Artillery Rocket & Missile Systems (ARMS)
- BOXER
- Land Combat Vehicles (LCV)
- Night Vision & Optoelectronics (NVO)
- PzH2000/Leopard

SURVEILLANCE, COMMUNICATION, COMMAND & CONTROL

- Alliance Future Surveillance and Control (AFSC)
- initial Alliance Future Surveillance and Control (iAFSC)
- AN/FPS-117 Radar
- **ELTA Radars**
- RADAR
- RAT 31 Radar
- Global Commercially Contracted Satellite Communications (GCC SATCOM)
- MACCE (MIDS – ACCS LOC1 – CCE Equipment)

AIR DEFENCE, MISSILE SYSTEMS, AMMUNITION

- Air-to-Surface Missiles (ASM)
- Air-to-air Missiles (AAM)
- Ammunition
- Ground-Based Defence (GBD)
- HAWK
- Land Combat Missiles (LCM)
- Layered GBAD/ESSI
- Modular Ground-Based Air Defence (GBAD)
- **Naval Strike Missile (NSM)**
- PATRIOT
- SIDEWINDER
- STINGER
- **Surface-to-Surface Missile Systems (SSM)**
- **Very Short Range Air Defence (VSHORAD)**



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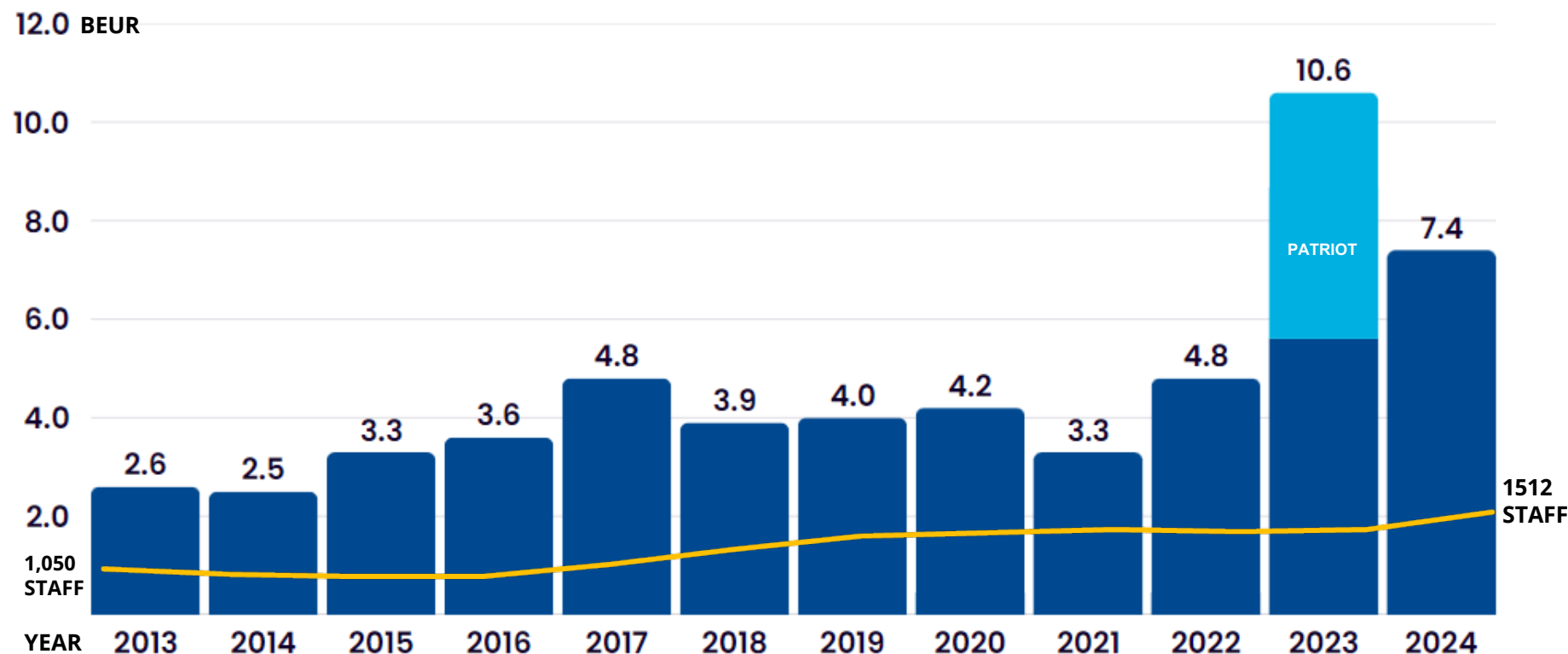
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OUR BUSINESS

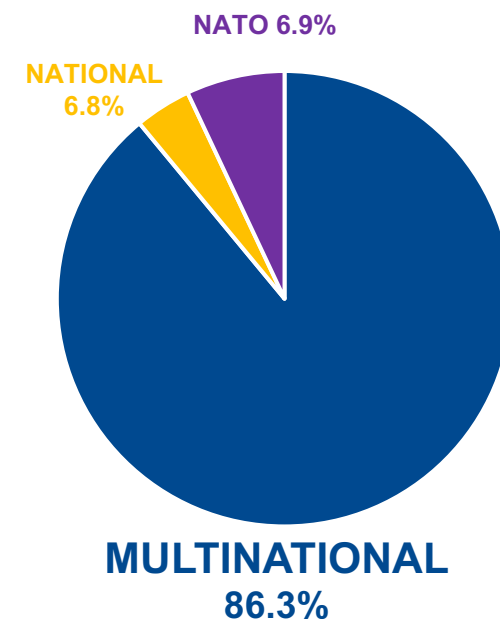
CUSTOMER-
FUNDED

NO PROFIT –
NO LOSS

7.4 BEUR
2024 CONTRACTS



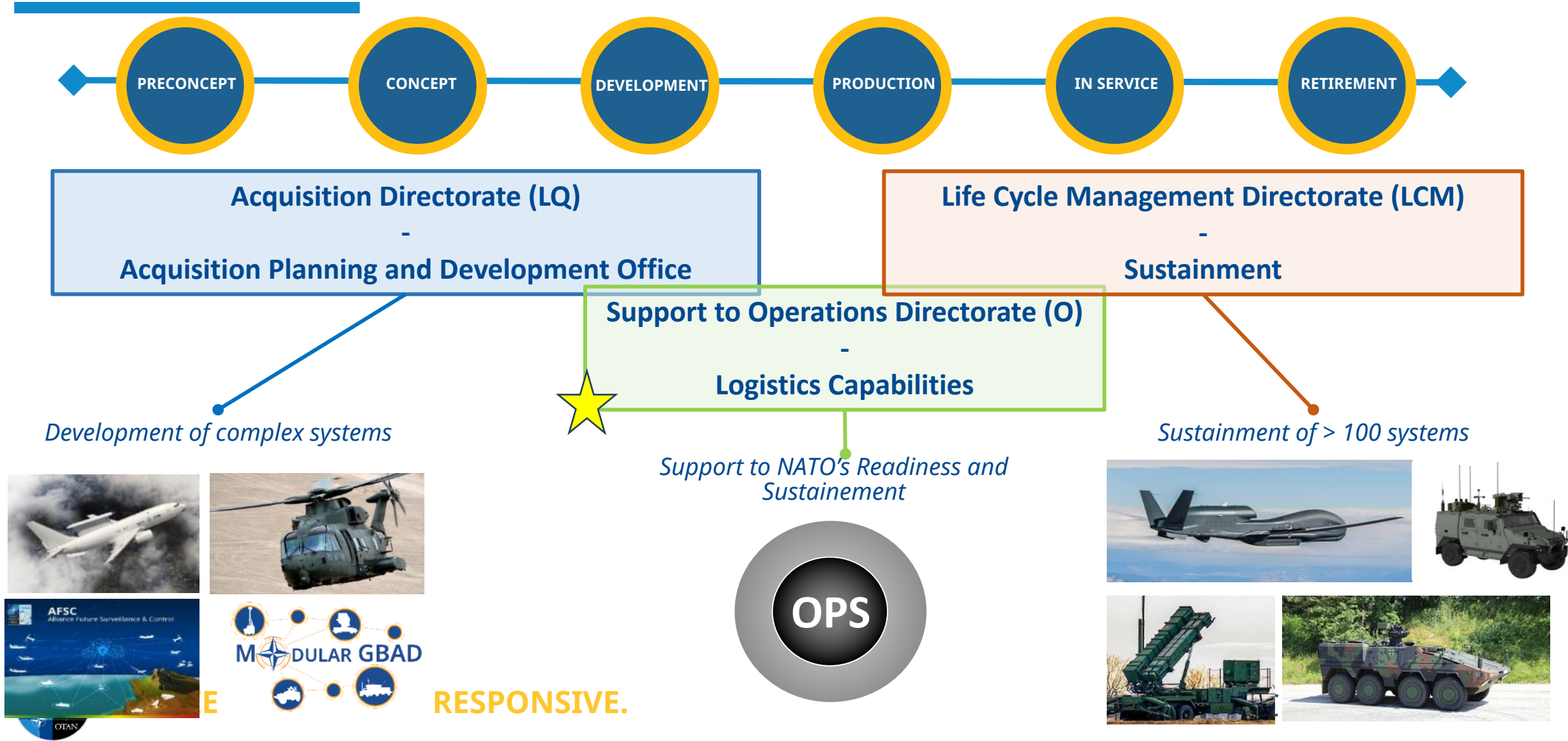
BUSINESS DOMAINS



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OUR DIRECTORATES



SUPPORT TO OPERATIONS DIRECTORATE

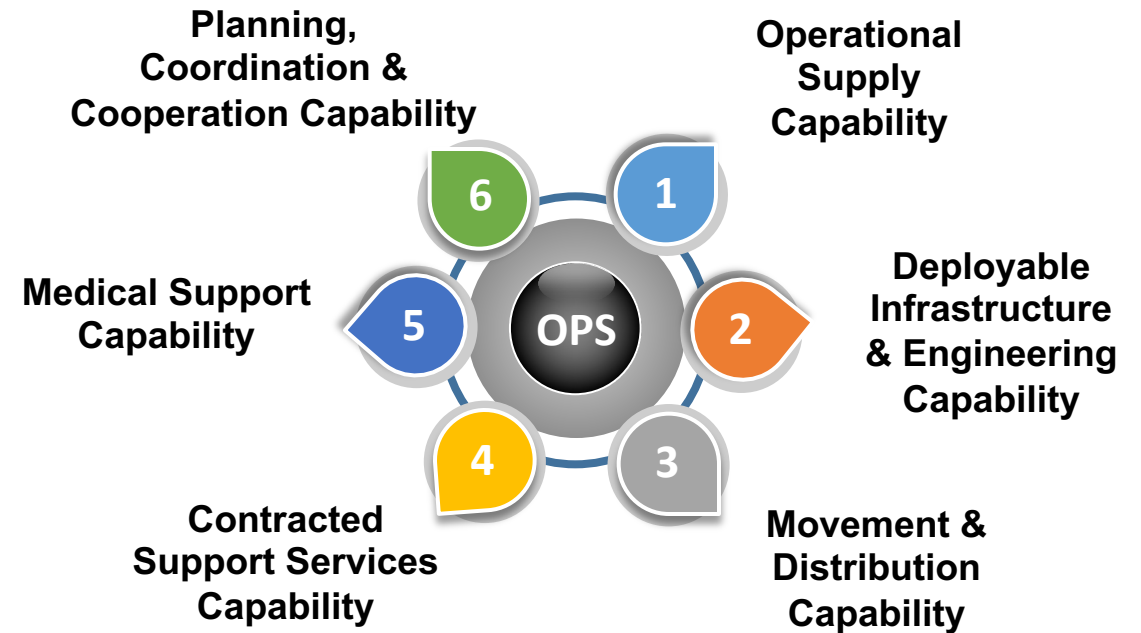
Mission

Be NATO's organization of choice for support to NATO operations, exercises and resilience activities under a Defence and Deterrence posture.

Through dedication to excellence in its capabilities, the Directorate strives to support NATO and the Nations its serves.

6 Core Operational Capabilities

- aligned with NATO's Deterrence and Defence core task and key logistics frameworks
- delivered through 9 Support Partnerships and 7 executing bodies



ENABLERS TO SUPPORT TO OPERATIONS CAPABILITIES

1

Operational Supply Capability

- Class 1 (Subsistence), 2 (Individual equipment, Vehicles), 9 (Repair Parts) supply services (**COMMIT**)
- Class 3 (POL) supply services (**MLSP**, **OS**)
- Class 5 (Ammunition) supply services (**ASP**)
- Class 8 (Medical) supply services (**MSP**)

2

Deployable Infrastructure & Engineering Capability

- Deployable infrastructure services (**SOC**)
- Infrastructure & Engineering services (**OE**)

3

Movement & Distribution Capability

- Multi-Modal Transportation and Warehousing services (**LS**)
- Multinational Rail Transportation services (**OLSP**)
- Strategic Airlift International Solution (**SALIS**)
- NATO Routing Hub (**NRH**)



ENABLERS TO SUPPORT TO OPERATIONS CAPABILITIES

4

Contracted Support Services Capability

- Operational Energy, Base and Real Life Support services (OS)
- Port services (MLSP)
- Global Food, Fuel and Global Access services (OLSP, OS)
- General Procurement Shared services (LB)

5

Medical Support Capability

- Strategic Aeromedical Evacuation and Global Medical Assistance services (OLSP, MSP)

6

Planning, Coordination & Cooperation Capability

- Operational Logistics Support Partnership (OLSP)
- NSPA Planning and Liaison Team (NPLT)
- Operations Response Cell
- Security Cooperation Support Partnership (SCSP)



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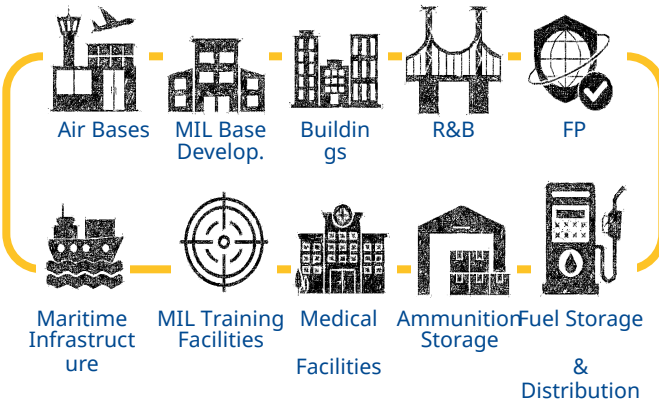
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THE 7 STRUCTURAL BODIES ENABLERS

- +/-500 staff
 - >10 duty stations
 - Wide variety of peace, crisis and war time operational support services
 - +/- 3 BEUR annual turnover
- **General and Cooperative Services Programme (LB)**
 - **Infrastructure and Engineering Programme (OE)**
 - **Operations and Support Programme (OS)**
 - **Southern Operational Center (SOC)**
 - **Transportation and Warehousing Division (LS)**
 - **NATO Planning & Liaison Team (NPLT)**
 - **Operations Response Cell (FORCE)**

INFRASTRUCTURE & ENGINEERING PROGRAMME



Mission	To contribute to the operational readiness of the Alliance by efficiently providing specialized expertise for the execution of National projects in NATO Member and Partner Nations and NATO Security Investment Programme (NSIP) projects as part of Alliance Operations & Missions and Capability Packages
People	> 50 staff, 7 deployed locations
Customer Base	NATO Nations, partner nations
Core Service(s)	- Infrastructure & Engineering services - Delivery of military permanent infrastructure in all NATO operational domains
Key Metrics	140 active projects 19 NATO countries 5 Operational Theaters & Partnership for Peace countries 2 BEUR active contracts

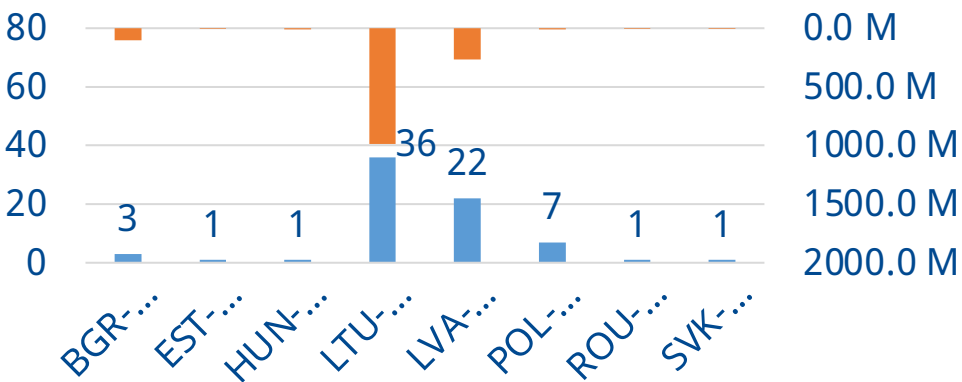


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EASTERN FLANK PORTFOLIO



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Work Typology	Projects	Sum of Values
Airfield Infrastructure	7	
Ammunition Storages	8	
Design Services	2	
Facilities		
Refurbishment	2	
Fuel Storages	3	
Maritime Infrastructure	4	
New MIL Infrastructure	3	
Offices and Buildings	8	
Range Infrastructure	6	
Roads Infrastructure	6	
Various MIL Facilities	23	
Grand Total	72	1378.2 M

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CONCLUSION



“**Aggregating demand** means combining large numbers of equipment orders from NATO Allies and harmonising requirements. This can **provide industry with clear and predictable requirements**, which helps the market understand exactly what Allies need - **enabling industry to invest in long-term production capacity**. This is what we do at NSPA and why the Defence Production Action Plan envisions a central role for the Agency”

**Ms Stacy Cummings, NSPA General Manager
September 2025**

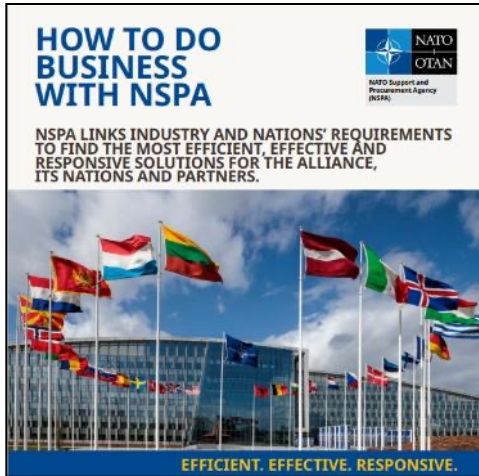
BACK UP



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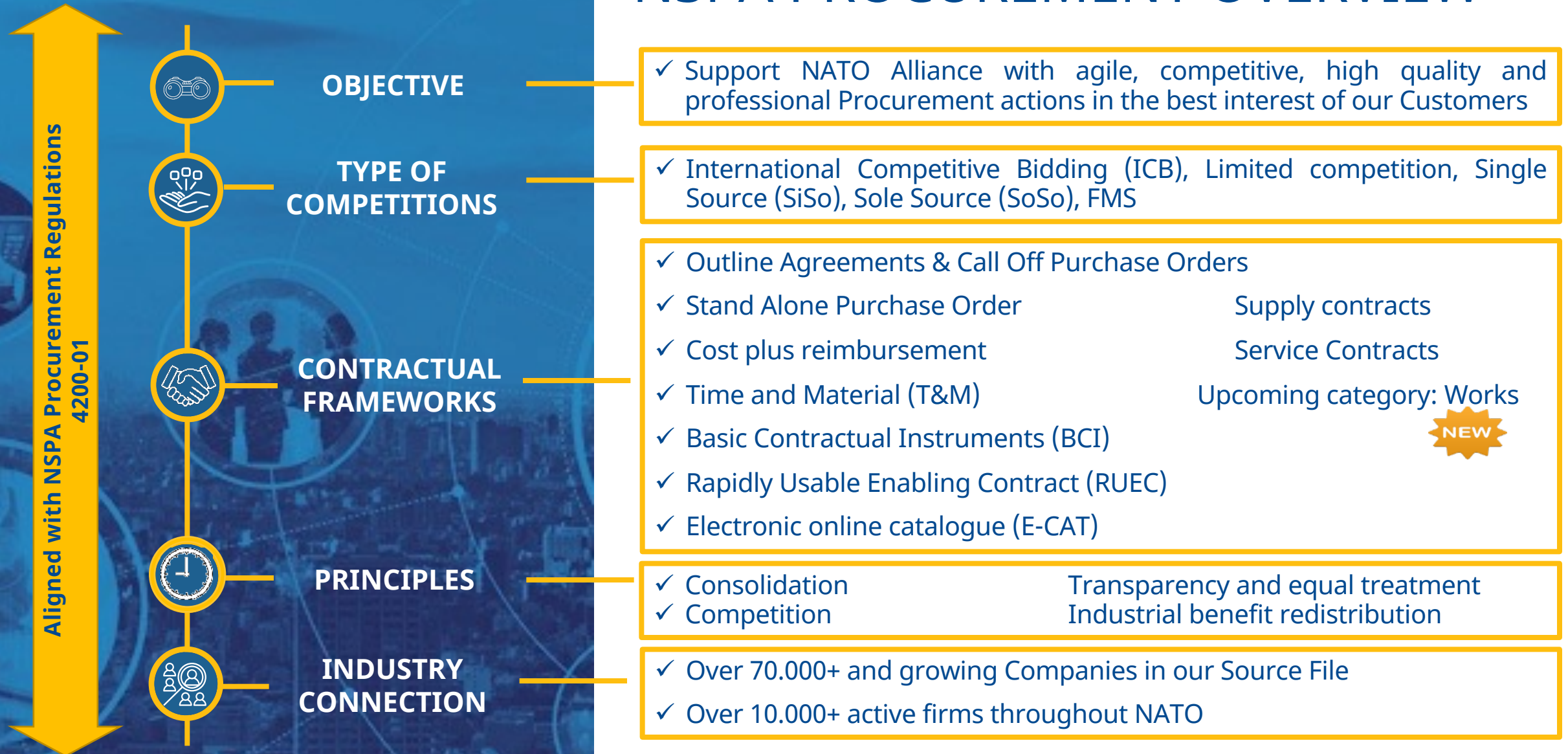
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HOW TO DO BUSINESS WITH NSPA



1. Check registration in NSPA Source File (mandatory to participate in NSPA RFPs).
 - If you are already registered, update your company's capabilities and contact details by emailing Source File Team: source-file@nspa.nato.int
 - If you are not registered Application through NSPA Website: [NSPA | Vendor Registration](#)
2. Check if your company has an e-Procurement account or if your account is up to date by contacting the e-Procurement helpdesk Team: e-procurement.helpdesk@nspa.nato.int
3. Take a look at our Future Business Opportunities (FBO) and Request for Proposals (RFP) available on the NSPA Website: [NSPA | Opportunities](#)

NSPA PROCUREMENT OVERVIEW



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