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Romania's Defence Industry at a Crossroads: Modernising Capabilities and Mitigating Dependencies through SAFE Funding

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RESEARCH REPORT

Introduction

On September 9th 2025, Romania obtained the allocation of €16.68 billion through the Security Action for Europe (SAFE) programme, the second-largest sum among Member States (European Commission, 2025). The initiative stems from the Union's mission to achieve strategic autonomy of defence capabilities by encouraging investments in support of European industry, and provides Romania with both a lifeline and a test: a lifeline to bridge long-standing gaps in military readiness, and a test of its ability to translate EU financial instruments into meaningful reform and deeper regional integration (Soare, 2024). This development provides the backdrop for assessing the country's defence posture at a time when the Black Sea area remains a flashpoint of instability, and Russia's aggressive hybrid strategy blurs the line between peace and conflict in Eastern Europe.

The paper starts by briefly outlining the recent trajectory of Romania's Defence Technology and Industrial Base (DTIB), marked by the tension between modernisation goals and a legacy of underinvestment and inefficiencies. The main structural vulnerabilities are examined to emphasise how reliance on military procurement from extra-EU actors has caused weak competitiveness, risky dependencies and a peripheral role in European defence integration (Iancu, 2025). The analysis then turns to the opportunities presented by SAFE to revitalise Romanian domestic production, strengthen ties with neighbouring allies and adapt to the evolving threat landscape. A successful implementation of SAFE funding will hinge not only on fulfilling short-term security needs, but also on laying the foundations for a more competitive and strategically relevant defence industry.

2. Romania's defence sector and the National Defence Industry Strategy

During the communist era, Romania established robust foundations in the weapons industry and advanced manufacturing capabilities in military production (KPMG, 2025, p.3). Yet throughout the 1990s, the defence sector saw a drastic downsizing and many factories were closed, as the country faced the arduous transition to a market-oriented economy (Euro-Atlantic Resilience Centre, 2024). Following decades of underinvestment and demand contraction, the current Romanian DTIB suffers from obsolescent technology, an aging workforce, and shortage of skills, causing a persistent lack of competitiveness for the state-owned company ROMARM (Soare, 2024, p.7). As for planned expenditure, Romania has been arranging its defensive capabilities based on an appreciation of the strategic situation in the Black Sea area and surrounding territories. In response to rising regional threats, dating back to Russia's illegal annexation of Crimea and the Donbas War in 2014, the defence budget has been steadily increased, and in 2024 it exceeded the threshold of 2 per cent of GDP for the ninth consecutive year at €9 billion (KPMG, 2025, p.12). Indeed, Bucharest has proven to be one of the most responsive European partners in the Alliance with regards to pressure exerted by the U.S. to raise budgetary commitments, and Prime Minister Bolojan has expressed the intention to reach 3 per cent of GDP in the near future (Reuters, 2025b). Romania has thus reaffirmed its orientation as an engaged ally towards upholding NATO's cardinal deterrence principle. In an attempt to replace obsolete post-communist equipment and upgrade assets in line with NATO's Standardisation Agreement (STANAG) criteria (Romanian Military Thinking, 2014, p.107), a significant portion of defence spending has been directed to acquisitions from foreign countries rather than to investments in domestic production capacity. Accordingly, in recent years Romania has placed major contracts with the U.S. for the supply of Patriot missiles; with Turkey for smart munitions technology transfer; and with the Republic of Korea for the supply of self-propelled howitzers (Saw, 2023, pp.3-5). Nonetheless, the latest National Defence Industry Strategy approved for the cycle 2024-2030 seems to outline a new strategic paradigm, centred around modernisation and competitiveness. Recognising the shift towards more technologically advanced defence systems, the document stresses the added value of nurturing an institutional culture based on knowledge and innovation (KPMG, 2025, p.6). The aim is to foster a strong domestic industry and the hi-tech capabilities to protect essential security interests through a credible deterrence posture. The government also points at the reorganisation of the Romanian Armed Forces to achieve a flexible, multi-domain force structure by 2040. Overall, the national strategy signals Romania's ambition not only to achieve territorial security, but also to foster a homegrown defence ecosystem that is self-sufficient and export ready. Its successful implementation will largely depend on overcoming some of the country's fundamental vulnerabilities in this sector, which are outlined in the next section.

3. Romania's Defence Technology and Industrial Base: Vulnerability analysis

The most evident weakness of Romania's DTIB lies in its inefficient state-backed structure inherited by Soviet guidance. After the dissolution of the USSR, the defence sector was not viewed as a competitive enterprise, hence it underwent substantial economic downscaling: the main consequence was very limited funding for research and development purposes, causing factories to operate at a loss and with inadequate technological standards (Halem, 2024). Instead of relying on oversight and regulation, a mandatory 50 per cent state ownership requirement is in place for defence manufacturers, hampering innovation and private investment (Cozma, 2025). The industry operates in a fragmented regulatory framework where the Ministry of Economy manages the ROMARM company and its subsidiaries, while the Ministry of Defence oversees planning and execution, and all contracts over €100 million require parliamentary approval (Cozma, 2025). Such ambiguous decision-making environment amplifies bureaucratic inefficiency and lack of transparency, further discouraging growth and modernisation. These difficulties are reflected in the fact that, despite official budget allocation, at least €4 billion have remained unspent over recent years due to red tape and slow implementation (Mihălțian, 2025). In contrast to other European countries procuring internally, most of the industrial output of domestic players, Romania only sources 5 per cent of ROMARM's production (Soare, 2024, p.7), with the company making all profit on exports in support of Ukraine. As a result, Romania's DTIB suffers from weak competitiveness and does not stand ready neither to cover national security needs, nor to gain a profitable portfolio of foreign orders. As a stark example of the absence of a sovereign supply chain even for basic equipment, while ROMARM could technically produce 155mm artillery required under the EU's ASAP ammunition production programme, no defence company in the country is able to produce gun powders and other key components (Soare, 2024, p.8). Another closely related weakness in Romania's approach to defence is of strategic nature, and arises as a result of procuring almost all equipment from foreign providers. Namely, among the aforementioned partnerships with extra-EU countries, Romania heavily leans on the U.S. Foreign Military Sales process, which gives direct access to top-line equipment produced by American companies such as General Dynamics and Lockheed Martin

(KPMG, 2025, p.14). Last year, the government secured a $920 million loan with the explicit mandate by the White House to strengthen the security architecture of NATO's eastern flank, and is negotiating to acquire 300 U.S.-made infantry fighting vehicles as part of a deal estimated at $3 billion (Mihălțian, 2025). It is no coincidence that the partnership with the U.S. remains a central pillar by extending American military presence on Romanian soil: the first European F-16 training centre was established here in 2023 (Ministry of National Defence, 2024), and over 1,700 U.S. soldiers are stationed across Romanian bases (Veress, 2025, p.8).

On top of these weaknesses, Romania has proven vulnerable to hybrid attacks that increasingly destabilise international security and render the threat landscape ever more complex. The European Centre of Excellence in Helsinki (2021) defines hybrid threats as "the integrated use of a wide range of methods to exploit the target's vulnerabilities", usually without crossing the threshold of open warfare. Notably, Russia has intensified its hybrid activities to undermine the stability and cohesion of Europe and NATO allies. Although not exhaustive of Russia's hybrid arsenal, recent developments show that Romania in particular has been targeted through tactics of:

- Information manipulation – Romania's 2024 presidential elections saw an unprecedented move by the Constitutional Court to annul the first round, citing evidence that the electoral process had been severely compromised across all stages. Declassified intelligence reports (Martinescu et al., 2024) revealed a coordinated effort of algorithmic Manipulation and cyber-enabled disinformation campaigns to surge the ultranationalist Călin Georgescu as the most voted candidate despite his minimal public profile. Exploiting weaknesses in cybersecurity, social media governance and public awareness, thousands of channels and accounts originating mainly from Russia were activated to disseminate highly polarising content based on conspiratorial narratives (Bjola, 2025). Despite the exclusion of Georgescu from the presidential race, the annulment of the election was in itself a strategic success for Russia, eroding trust in Romania's democratic institutions and signaling the need to integrate reactive crisis management with proactive preparedness against informational coercion.

- Sabotage of energy infrastructure - In the aftermath of the large-scale invasion of Ukraine, Romania and other countries in the region have identified Azerbaijan as a significant provider and as a theoretical alternative to Russian oil. This leads to speculation about greater reliance on Moscow for security of supplies than official data suggests, considering how the Kremlin has been accused of exerting pressure on the Azerbaijani government to utilise the TANAP and SPC pipelines for the transportation of its own oil and gas supplies (CGEP, 2024), and gain access to the European market. Accordingly, Russia has been pursuing an aggressive strategy targeting such dependency in the energy sector. In August 2025, the authorities in Bucharest initiated an investigation into a potential incident of Russian sabotage aimed at contaminating Azerbaijani crude oil intended for the Petrobrazi refinery (Caucasus Watch, 2025); the supply exhibited elevated concentrations of corrosive organic compounds, resulting in the cancellation of scheduled deliveries to the Romanian port of Constanta and a temporary shortage at the refinery.

Irrespective of the circumstances of the specific incident, the latter illustrates how Russia can exploit even indirect avenues to fulfill its objectives.

Within a context of growing tension and the ongoing war in Ukraine, the main priority for Romanian policymakers seems that of retaining access to state-of-the-art military assets with guaranteed interoperability for immediate protection. Although the relationship with the U.S. fulfils short-term security considerations, it is however problematic insofar as it can lead to significant dependency on external actors and uncontrolled dynamics in a sphere so delicate and sovereign as the safeguard of national security. At a time when global supply chain disruptions limit market access to critical components, and commercial tariffs are increasingly used as a form of political retaliation (Yap, 2025), this government-to-government acquisition strategy may render defence capabilities in fact more vulnerable, especially if coupled with a marginalised domestic industry. Overall, these vulnerabilities constrain Romania from fully leveraging the EU toolbox towards improved defence readiness and more integrated capabilities. European defence is undergoing a profound transformation, driven by a commitment to develop interoperable capabilities and strategic autonomy. At the core of this vision lies the European Defence Fund (EDF), an initiative seeking to foster harmonisation of Member States' defence investments and industrial policies under a supranational framework (European Commission, 2017). Nonetheless, the EDF is envisaged to support the development of next-generation technologies rather than immediate operational readiness, and funding is allocated through a competitive selection process (Iancu, 2025, p.221). This has exposed the weakness of Romania's DTIB and has hindered meaningful participation in cross-border partnerships. The share of total budget assigned to Bucharest has remained below 0.5 per cent in the first three years (2021-2023) of EDF implementation (Iancu 2025, p.224); and only one project is led by a Romanian enterprise, with no other domestic company involved in the consortium (European Commission 2023) showcasing little networking and coordination within the defence ecosystem. Similarly, analysing participation in initiatives under the Permanent Structured Cooperation (PESCO) framework, Iancu (2025, p.225) finds that most projects where Romania is involved do not target conventional combat and warfare domains, but are limited to information systems, materials, and energy. Such a narrow approach likely reflects not only industrial shortcomings, but broader misalignment with the EU's defence mission. Romanian policymakers are keen on stressing that NATO membership constitutes the most reliable guarantee of security, without the pressing need to create a parallel defence structure; references to European cooperation are framed as a means of achieving greater synergy between the Alliance and the Union, with particular attention to consistency and the avoidance of duplication between different initiatives (Soare, 2025, p.5). Either way, the country is missing out on increasingly available and financially advisable opportunities to diversify sources of military procurement and mitigate dependency on external actors.

Nevertheless, the government has acknowledged the importance of aligning internal planning with the strategic direction put forward by the European Commission, as a way to better position the country to compete for available funding. The following section explores which opportunities arise for meaningful revitalisation of the defence sector through accession to the EU's new financial instrument, which complements the EDF by emphasising immediate operational needs.

4. SAFE: Opportunities and Recommendations

Launched in May 2025, SAFE is designed to provide financial support to Member States by allowing urgent and major investments, with a focus on closing critical capability gaps in defence (European Commission, 2025). Romania has expressed interest and will benefit from €16.68 billion, the second-largest allocation. Its military equipment purchases over the next five years will therefore be funded through this instrument, with a 40-year repayment term and significantly more favourable conditions than those the government could secure independently (Government of Romania, 2025). Importantly, procurement contracts under this scheme must ensure that no more than 35 per cent of component costs originate from outside the EU or EEA (European Commission, 2025). The requirement stems from the Union's willingness to leverage European economies of scale to boost defence readiness, which is envisaged as a public good and thus implies a common responsibility (European Parliamentary Research Service 2024, p.1). Accordingly, there are some steps Romania can take to utilise SAFE funds in line with Brussels' vision, moving away from its status of passive beneficiary.

First, government-to-government agreements with extra-EU actors should give way to 'buying European' as the primary course of action. Sourcing assets from major players in the European defence ecosystem would make the path to defence modernisation financially more affordable, because the EU could provide complementary executive capacity through financial incentives, supervision of agreements and technical assistance, thus fostering trust and lowering overall costs (European Parliamentary Research Service 2024, pp. 20.21). The economic gains would be even larger by leveraging offset requirements which are already commended by Romanian law (KPMG, 2025, p.4), so that purchases imply compensation in the form of technological and industrial cooperation. A virtuous example is the joint venture signed with GDELS (ROMARM, 2021), where the acquisition of Piranha 5 armoured carriers was followed by the local production of subsequent batches in ROMARM factories. Private sector investments can yield a multiplier effect in the local economy, creating additional defence jobs and eventually promoting a meaningful role for Romania in European value chains. The recent announcement by Germany's Rheinmetall of the construction of a €535 million munitions factory in Romania (Reuters, 2025a), capable of covering needs for ignition powder of the entire region, goes in this direction.

Second, Romania should be able to secure superior procurement terms by proactively engaging in regional cooperation for joint acquisitions, specifically by partnering with Poland, which has received the largest portion of SAFE budget and shares plans to modernise its military assets (Adamowski, 2025). The benefits would be manifold, from harnessing collective buying power to ensuring fully standardised equipment and improving bilateral relations (Cozma, 2025). Both countries are in the process of replacing Soviet-era infantry fighting vehicles, and the Polish government has advocated for the establishment of a consortium to jointly procure them from the national defence company PGZ (Adamowski, 2025). Even though Romania is evaluating other foreign providers, selecting the 'near- shoring' option from a neighbouring ally would facilitate the transfer of know-how and technological capabilities, should it aim to transition manufacturing to the domestic sector and bolster its autonomy. Broader cooperation among Central and Eastern European countries should seek to boost defence readiness of the whole region while favouring interoperability. For instance, training activities and the production of spare parts for F-16 aircrafts through the newly established maintenance centre could be extended to Bulgaria and Slovakia, which have recently acquired the F-16 too (Kogan, 2021, p.18). Third, part of the funds could be leveraged for dual-use infrastructure on the basis of Romania's potential to play a leading role in Ukraine's post-war reconstruction. The government is interested in a steady resolution of hostilities, and has confirmed its intention to actively verify the implementation of any ceasefire agreements (Veress, 2025, p.2); yet, sharing the longest land and sea border with Ukraine, the country is in a position to use its geographical proximity to step up its commitment in favour of reconstruction activities. Planned upgrades could include roads and rails to enhance cross-border connectivity, and business centres and industrial parks in border counties to sustain commercial flows. Serving as a key logistical hub for all aid efforts would unlock improvements to the infrastructure network in the name of delivering the best possible support to a war-torn country.

One final aspect that Romanian authorities should not neglect when proposing projects eligible for SAFE funding is the diversity of threats that destabilise international security. The reconfiguration of power balances at the global level, marked by new spheres of influence and rivalries between major geopolitical actors, emphasises the need to respond to both traditional and hybrid, unconventional challenges. Although the hybrid attacks suffered by Romania are often hidden under the veil of plausible deniability, they aim at capitalising on vulnerabilities of critical infrastructure through asymmetrical methods; Romania must therefore account for the need to adopt a comprehensive approach to security, spanning beyond 'hard' military capabilities.

Romania's resilience in this field, and namely to information manipulation, is under the spotlight also because of repercussions on the volatility of the Union's eastern front. Bucharest has long served as Moldova's primary ally in its pursuit of EU accession, with consistent support in diplomatic forums and economic assistance (Toderas, 2024). The pro-Western leadership in Chișinău, already under pressure from domestic Russia-affiliated media and parties operating overtly and public frustration with the slow pace of reforms, relies heavily on this partnership as a stabilising force (Colibășanu, 2025, pp.8-9). A firm, continued commitment by the Romanian government in favour of Moldova's accession could empower the EU to elevate its enlargement policy to a proactive strategy aimed at containing the extension of Russia's sphere of influence. Conversely, a euro-sceptic narrative shift fuelled by foreign manipulation could compromise Moldova's aspirations, and weaken the EU's enlargement agenda altogether.

5. Conclusion

Romania's defence posture stands at a decisive crossroads. Growing budgetary commitments and a strong orientation to NATO's deterrence mission demonstrate a clear resolve to modernise the country's Defence Technology and Industrial Base. This paper examined how persistent reliance on foreign procurement has ensured immediate security but has exposed critical vulnerabilities linked to external dependency and limited integration in EU frameworks. The recent accession to the SAFE mechanism offers an opportunity window to reverse these trends. Arguably, it is no panacea for decades of underinvestment in research and development and structural inefficiencies, which will have to be addressed through a coherent long-term strategy and bold reforms to streamline decision-making in the defence sector (Iancu, 2025). Yet, the success of this transition will also depend on the extent to which Bucharest is able to capitalise on SAFE funding as a catalyst for innovation and readiness by prioritising European sourcing, fostering regional cooperation for joint acquisitions, and investing in dual-use infrastructure. The potential for a leading role in favour of Ukraine's reconstruction and of Moldova's EU trajectory further underscores the strategic importance for the stability of the eastern flank. As the security landscape is being reshaped by Russia's hybrid tactics and shifting global power balances, the path pursued by Romania is likely to determine its standing as a credible pillar of European defence.

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