



DG DEFIS

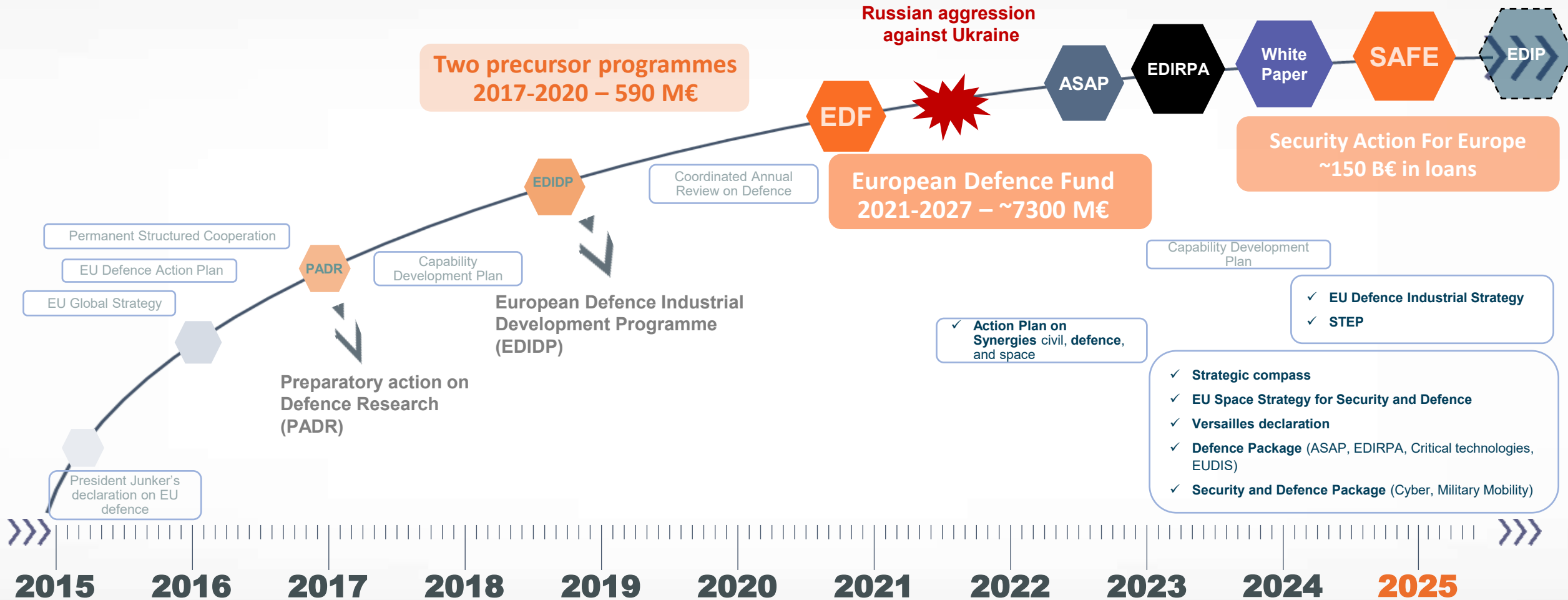
Defence technologies

Unit B.2 – Directorate B
Defence Industrial Programmes

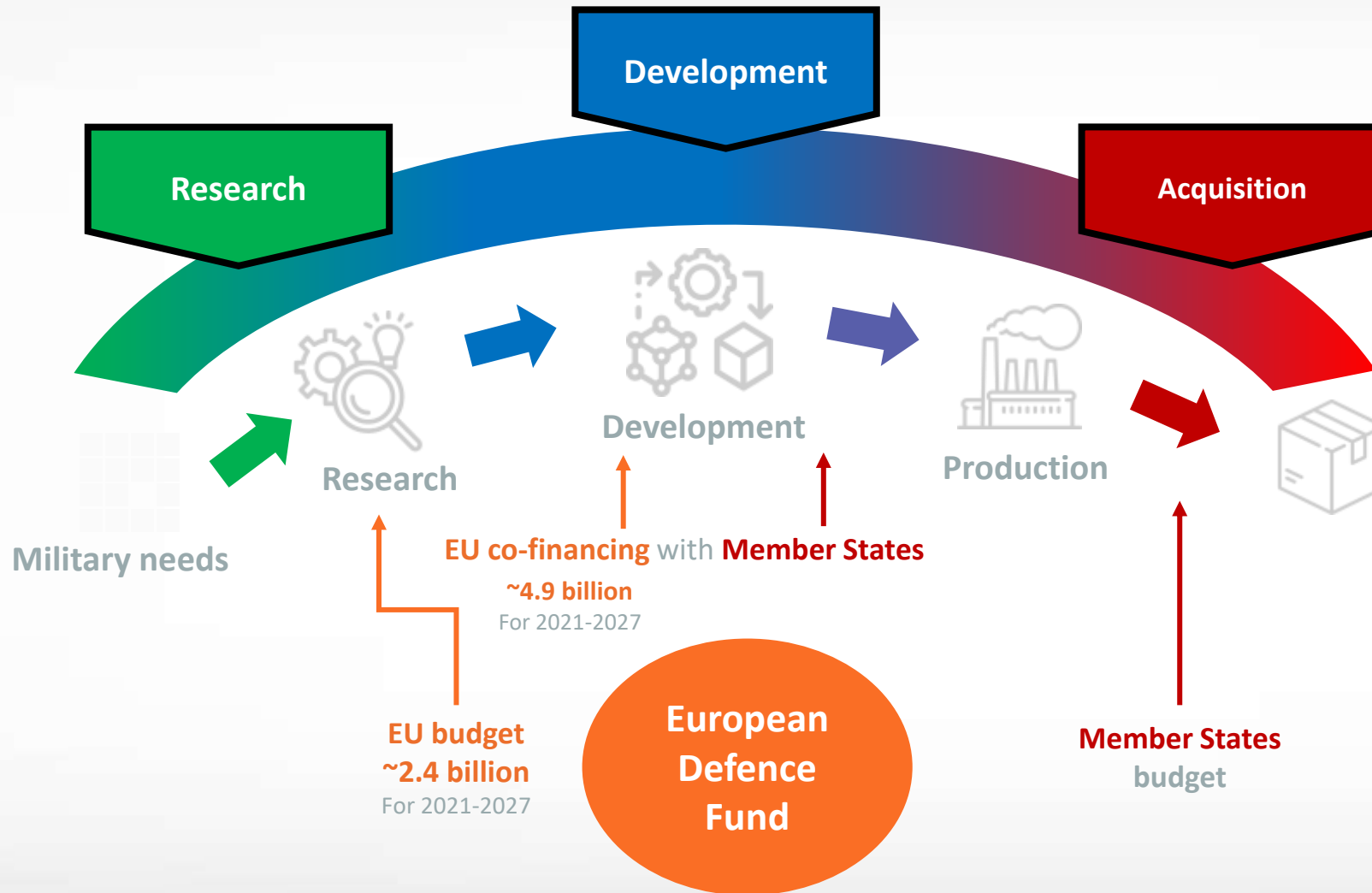
Dirk Peters
Policy Officer

INESC Brussels HUB Summer Meeting 2025
26 June 2025

>>> Scaling EU's collaborative approach to defence investment



>>> EDF: the EU Defence R&D Programme



- EDF financial support mainly in the form of **grants** (not procurement)
- **Annual adoption** (MS' vote) of work programmes and award decisions
- Open to **EU Member States and Norway**
- Security-based participation **conditions** for entities controlled by third-countries

>>> EDF 2024 call results

EU invested in 62 ambitious defence projects with €910 million funding

KEY FIGURES



>>> Research organisations - an integral part of EDF projects

Research organisations represent 28% of EDF participations



830

Participations by research organisations

453

Unique participations

283

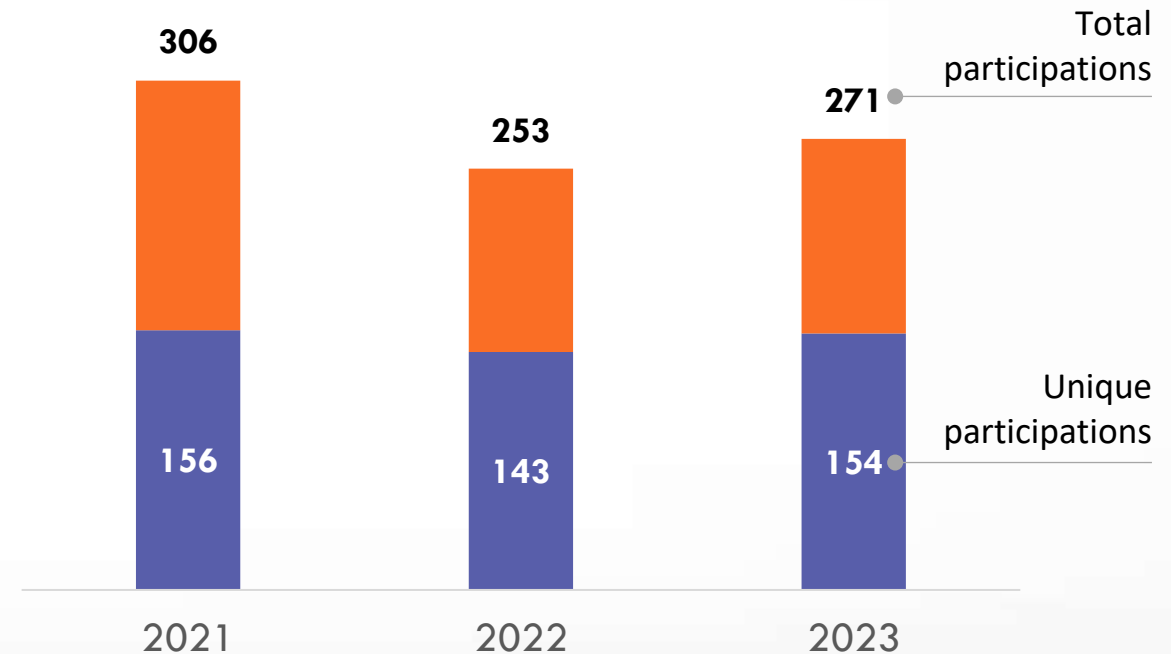
Higher education institutes



529 M€

EU grants to research organisations

Strong yearly participation of research organisations*



* Research organisations include RTOs and universities

EDF Work Programme 2025

EUR ~1.065 billion

33 topics

Call opened in Feb 2025

Deadline for submission: 16 Oct 2025 17.00 CET

 Medical Response & CBRN	- SGA under FPA on medical countermeasures   13.5 M€ - SGA under FPA on medical countermeasures   11.5 M€ - Autonomous triage and evacuation  10 M€	
 Information superiority	EU MIDS   39 M€	
 Sensors	- Multi-band 4D radar   29.5 M€ - Infrared detectors   29 M€	
 Cyber	- Robustness of autonomous vehicles (spin-in)   20 M€ - Improved cyber defence operation capabilities   34 M€	
 Space	- On-orbit operations and services (spin-in) 49 M€ - Space-based ISR constellation  66 M€	
 Digital transformation	Human-AI dialogue systems (challenge)   27 M€	
 Energy & Environment	- Propulsion system for next generation rotorcrafts  25 M€ - Naval hybrid propulsion and power systems (spin-in)   20 M€ - Aircraft propulsion and energy management systems   48 M€	
 Materials & Components	Chiplet for defence applications   25 M€	
 Air combat	- Collaborative air combat  49 M€ - Enhanced pilot environment  54 M€	
 Air & missile defence	Not addressed	
 Ground combat	- Counter-battery capabilities 20 M€ - Future modular multipurpose land platforms  79 M€ - Drone-based mass munitions (spin-in, cascade funding) 49 M€ - Land collaborative combat including air-land   44 M€	
 Protection & Mobility	Soldier systems (cascade funding)  35 M€	
 Naval combat	Digital ship and naval combat cloud   54 M€	
 Underwater warfare	- Advanced underwater networks   25 M€ - Stand-off anti-submarine warfare  20 M€	
 Simulation & training	- Design and analysis framework for Aerial Systems  28 M€ - Live, Virtual, Constructive training interoperability   15 M€	
 Disruptive technologies	- Great-Depth Enabling Technologies (R) 23 M€ - Non-thematic research topic 20 M€	
 SMEs	- Non-thematic research for SMEs and ROs 34 M€ - Non-thematic development for SMEs 33 M€	
 Others	Other actions (outreach, IT, studies, audit, indirect management) 6,6 M€ - Business coaching for SMEs 1.6 M€ - Blending facility for equity funding for SMEs/Mid-Caps 20 M€ - Business accelerating services 3.8 M€ - Matchmaking events for investors and SMEs 0.6 M€ - EDF hackathon events 0.6 M€ 2 M€	

Legend:

Research Development  STEP  EUDIS-related
 Contributing to identified EDF main expected outcomes



EUDIS opportunities :

2B € until 2027



CHALLENGE YOUR IDEA

27.6 M€

- Defence Hackathon (0.6 M€)
- Technological Challenge on Privacy-preserving human-AI dialogue systems (27 M€)



EMPOWER SMEs

116 M€

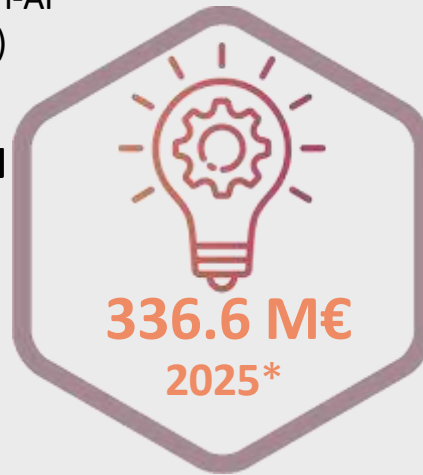
- Open SME R&D calls (67 M€)
- Research calls for disruptive technologies (43 M€)
- Business coaching for SMEs (1.6 M€)
- Business Accelerator & Matchmaking (4.4 M€)



ACCELERATE YOUR INNOVATION

35 M€

- Soldier Systems – A selected consortium invites individual SMEs and start-ups for targeted acceleration services



**336.6 M€
2025***



IMPROVE ACCESS TO FINANCE

20 M€ (total 175 M€ until 2027)

- Defence Equity Facility, implemented by the European Investment Fund



MIGRATE YOUR INNOVATION FROM CIVIL TO DEFENCE

138 M€

- Research spin-in calls on Cyber (20 M€) and Energy & Environment (20 M€)
- Development spin-in calls on Space (49 M€) and Ground Combat (49 M€)

- EDF Work Programme 2025



Defence Hackatons:

EUDIS Defence Hackathons bring together participants with different backgrounds to develop cutting-edge solutions addressing key defence challenges. Teams will co-operate, innovate, and compete to develop promising solutions.

Hosted in **8 different locations across the EU**, hackathons are an excellent opportunity to attract skilled individuals & startups to the defence sector and connect end-users with industry.

How does it work?

- Individuals can get involved either as **participants** or as **mentors** supporting participants in refining their solutions.
- Participants work in teams to **present innovative ideas** that address current defence capability and technology needs.
- Winning teams receive a tailored **mentoring program** and other rewards, such as a **monetary prizes**, to help them advance their projects further.

Who can participate?

- You must be a **resident** and **citizen**, aged 18 or older, of any **EU Member State, Norway, or Ukraine**.

Why should I apply?

- If you are a **business** or a **researcher** keen on learning more about the defence sector and exploring potential opportunities.
- If you are an **SME** or **startup** seeking to scale up.
- If you are an existing **defence startup** eager to connect & cooperate with military end-users.

[Register for the Defence Hackathon](#)



Disruptive Technologies Calls:

Disruptive Technologies Calls support proposals for groundbreaking, high-risk/high-reward research that has the potential to bring about radical change in the defence sector.

How does it work?

- **Consortia consisting of at least two entities from a minimum of two EU Member States and Norway** may submit proposals in any area of defence interest.
- Successful applicants will receive **up to 100%** of the required funding as a lump sum grant.
- Additionally, successful beneficiaries can access **business coaching services** to advance their results to the next phase of development.

➤ **Check out the available calls**

Who can participate?

- The call encourages the **participation of new actors in defence research and innovation** such as researchers, high-tech SMEs, visionary research centers, universities, or research and technology organisations.
- Applicants must be **members of a consortium** (a minimum of two entities from at least two different Member States or Norway) and respect the other eligibility conditions of the EDF Regulation.

Why should I apply?

- If you are an **ambitious entity** seeking to support your R&D activities in defence technologies and bring a **paradigm shift** in the conduct of defence affairs.
- If successful, you will receive **business coaching**, supporting your results' commercialisation.



Spin-in calls:

Spin-in Calls are thematic research and development calls aimed at transferring innovation from the civil to the defence sector. They seek to attract new players to the defence industry, accelerate innovation, and enhance the efficiency of EU funding by leveraging the dual-use potential of results from civil EU-funded R&D.

How does it work?

- During proposal submission, applicants must demonstrate that they have the **necessary rights and permissions to access and commercialise the results** from a previous civil EU-funded R&D project upon which their proposed solution is based.
- Proposals are eligible for funding as long as they **apply the results from a civil EU-funded R&D programme** to the defence sector.

➤ Check out the available calls

Who can participate?

- Spin-in calls are open to any consortium that can **demonstrate the added value and positive effect** of concepts or technologies originating from civil research for the European Defence Technological and Industrial Base.

Why should I apply?

- If you aim to further **develop the results of successful civil EU-funded R&D programmes**, advancing them to a higher technological readiness level or market maturity.
- If you seek to **leverage the dual-use potential** of civil innovations for defence while expanding into new markets.
- If you aim to **access additional funding** by exploiting synergies between civil, defence, and space sectors.



SME calls:

SME Calls support small and medium-sized enterprises and research organisations in developing innovative defence products and solutions and entering the defence market. Open to all defence-related topics, they provide funding opportunities for research and development activities.

How does it work?

- The SME Calls are **open and non-thematic**, meaning that applicants can submit proposals on any area of interest for defence.
- Annually there are two types of calls: **development actions** targeting SMEs and **research actions** targeting SMEs and research organisations.
- Successful applicants will receive **funding in the form of a lump sum grant** and may also benefit from business coaching to bring their results to the market.

Who can participate?

- The calls are **open to SMEs and research organisations** that are part of a consortium consisting of at least three companies based in minimum three different Member States or Norway.

Why should I apply?

- If you aim to further **develop the results of successful civil EU-funded R&D programmes**, advancing them to a higher technological readiness level or market maturity.
- If you seek to **leverage the dual-use potential** of civil innovations for defence while expanding into new markets.
- If you aim to **access additional funding** by exploiting synergies between civil, defence, and space sectors.



Check out the available calls

The Strategic Need

Dual-Use for Rapid Technological Development in Defense



The pace of hybrid, asymmetric threats requires a drastically **speedup** of **innovation cycles**.



Situations are dynamically changing, **continuous adaption** is key to success



Today's world is **software-defined** and **data-driven**, a key area of dual-use technologies

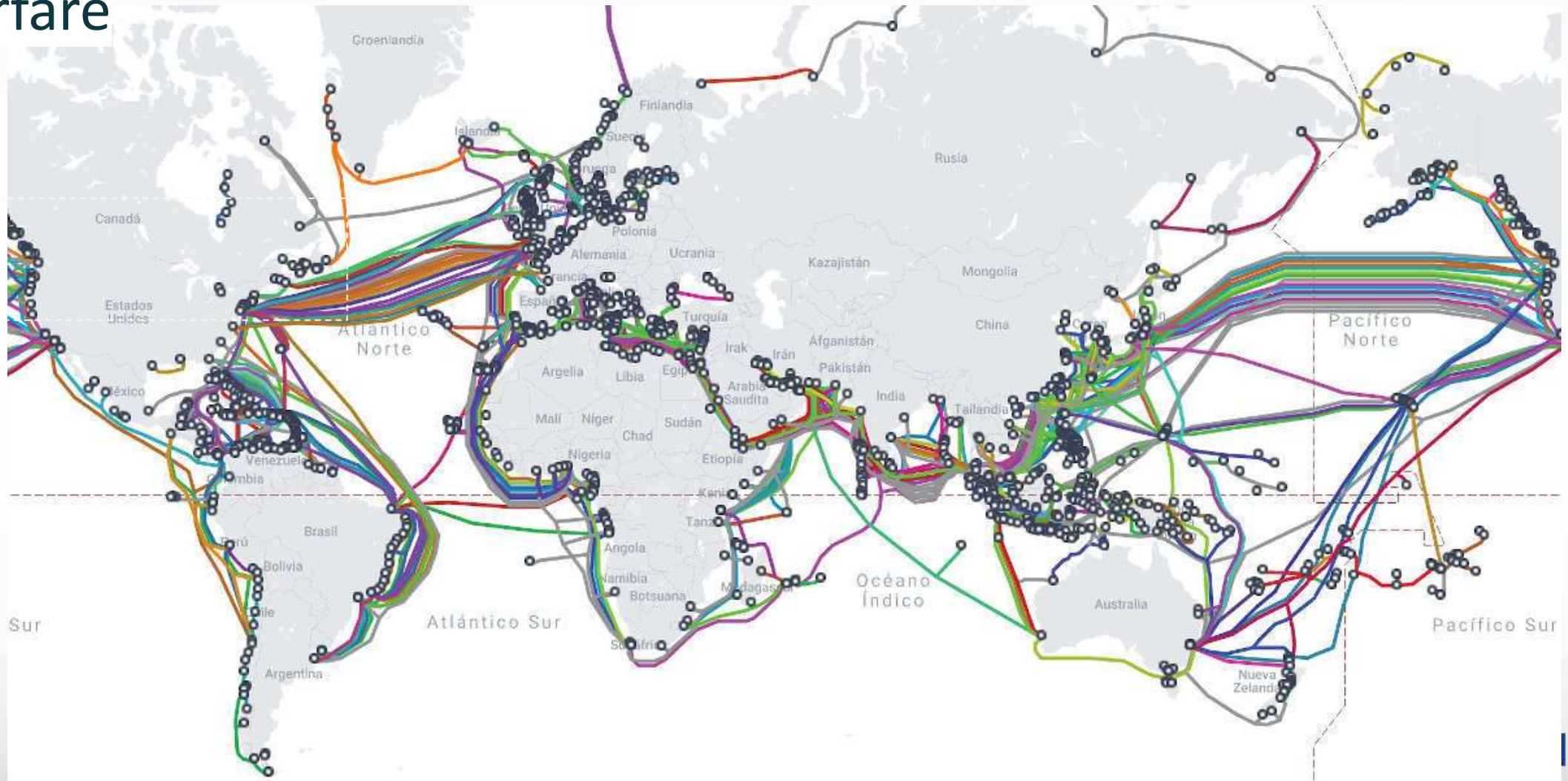
Challenges and Developments

Challenges for SME's and Startups in the Defense Domain

- Access to end-users and exchange is key for rapid prototyping and verification of approaches, difficult in highly secure environments
- Already relatively small funding amounts massive impact and generate output but need to be provided without complex processes and overhead
- SME's and Startups entering defense have to level-up security and fully adapt their organizational structures which needs long-term financial support
- Defining and reaching product-market-fit without the ability of open ecosystems is heavily complex

Our Oceans

Foundation of a modern world and environment for hybrid warfare



Our Oceans

Massive Changes and a Greenfield for Technological Developments



Infrastructure

Industrial use of our oceans leads to a high vulnerability of sensitive infrastructures (cables, pipelines, windfarms)



Autonomy

Autonomous systems are getting cheaper, providing new possibilities but also allow potential for malicious actors

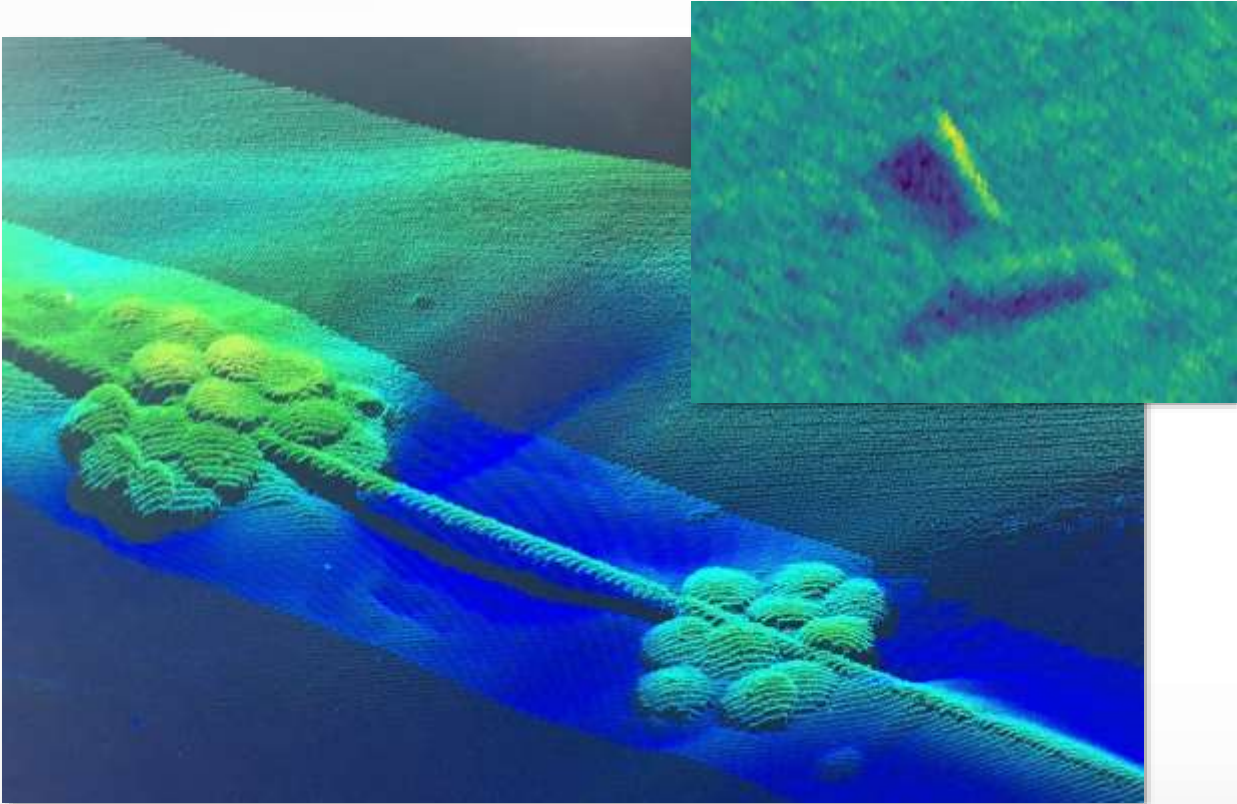


Connectivity

Satellite-based internet allows data transfer rates for large datasets and remote-operations at unknown scale

Ocean Technologies

A Prime Dual-Use Frontier



Platforms and autonomous systems pioneered in civilian science and ocean research

Sensor systems are used commercially and defence environments already today

Ocean Big Data Analytics based on dual-use technologies provide large chances for defence

AI already provides today massive potentials in ocean space, Quantum Computing will disrupt even more

>>> White Paper for European Defence - Readiness 2030

Making Europe Ready by 2030 (critical capability gaps)

- ▶ Air and Missile defence
- ▶ Artillery systems
- ▶ Ammunition and missiles
- ▶ Drones and counter drones systems
- ▶ Military mobility
- ▶ AI, Quantum, Cyber and Electronic warfare
- ▶ Strategic enablers and critical infrastructure protection, including strategic airlift, air-to-air refuelling, maritime domain awareness, space assets

Rebuilding European defence begins in Ukraine

- ▶ Direct EU military assistance
- ▶ Associate Ukraine to EU initiatives to develop and/or procure defence capabilities
- ▶ Integration of the Ukrainian defence industry into the European defence industry



Spending better, together and European

The need for a European approach

Better:

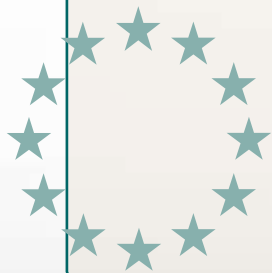
Investment in critical capability priorities, in line with existing EU and NATO processes

Together:

- ▶ Common procurement
- ▶ More interoperability
- ▶ Less fragmentation
- ▶ Economies of scale

European:

- ▶ Foster local growth
- ▶ job creation
- ▶ and reduce dependencies from third countries



>>> White Paper for European Defence - Readiness 2030

Releasing public funding for defence at national level

Need for Member States to invest more in defence

Commission invites activation of the national escape clause under Stability and Growth Pact for 2025-2028

Possibility to unlock around EUR 650 billion of additional defence investment at national level

Security Action for Europe – SAFE: A new dedicated instrument

Guiding principles:

Buy more Buy better
Buy together Buy European

Objectives:

- ▶ up to EUR 150 billion raised on capital markets, backed by the EU budget
- ▶ long-maturity loans to support common procurement
- ▶ boost defence procurement of critical areas (e.g., ammunition and missiles, artillery systems, space, AI, cyber)
- ▶ support the European defence industry

Functioning:

- ▶ Involvement of at least 2 Member States, or 1 Member State willing to open its procurement to Ukraine or EFTA countries
- ▶ Procurement to buy from industries of EU, Ukraine or EEA-EFTA countries
- ▶ Procured products must have at least 65% of domestic content from those countries

Mobilising the European Investment Bank and private capital

Increased contributions from the European Investment Bank to support defence and security projects

Improve access to financing for the defence industry

Mobilise private capital through the Savings and Investments Union



THANK YOU
