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JOINT WHITE PAPER. FOR AUROPEAN DEFENCE READINES 2030
European Commission

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HIGH REPRESENTATIVE
OF THE UNION FOR
FOREIGN AFFAIRS AND
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JOINT WHITE PAPER

for European Defence Readiness 2030

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1. INTRODUCTION

Europe faces an acute and growing threat. The only way we can ensure peace is to have the readiness to deter those who would do us harm. We have many strong foundations such as our potential to unleash vast resources and latent technological and industrial power. But we are also starting from a position in which our defence readiness has been weakened by decades of under-investment.

Our continent is currently being affected by war, aggression and other hostile acts. The European Union has immense wealth and productive power and a deep faith in the importance of democratic values shared across all Member States. But it is being coerced by external actors who are mobilising their resources and using technology more effectively to achieve their objectives. They are directly threatening our way of life and our ability to choose our own future through democratic processes. They believe that we are politically unable to summon a meaningful and strategically enduring response.

The international order is undergoing changes of a magnitude not seen since 1945. These changes are particularly profound in Europe because of its central role in the major geopolitical challenges of the last century. The political equilibrium that emerged from the end of the Second World War and then the conclusion of the Cold War has been severely disrupted. However much we may be wistful about this old era, we need to accept the reality that it is not coming back. Upholding the international rules-based order will remain of utmost importance, both in our interest and as an expression of our values. But a new international order will be formed in the second half of this decade and beyond. Unless we shape this order – in both our region and beyond – we will be passive recipients of the outcome of this period of interstate competition with all the negative consequences that could flow from this, including the real prospect of full-scale war. History will not forgive us for inaction.

Against this backdrop, Europe faces a fundamental choice about its future. Does it want to muddle through the years ahead, attempting to adapt to new challenges in an incremental and cautious way? Or, does it want to decide its own future, free from coercion and aggression, ensuring that the people of Europe are able to live in security, peace, democracy and prosperity? If we respond to this moment with determination, collective action and a clear strategy, we will strengthen our place in the world and renew our international alliances on a more sustainable basis. We will enable a renewal of the European project and improve the security, prosperity and well-being of our citizens. If we continue on the same path, however, we will end up diminished, divided and vulnerable.

Our security has benefited immensely from both NATO and the European Union. In recent years, we have worked ever more closely to respond to the threats we face. But this is not going to be enough for the years ahead. Europe must do far more if it is to restore credible deterrence and deliver the security on which our prosperity depends. This requires all Member States to act in solidarity and to invest in our collective defence.

The future of Ukraine is fundamental to the future of Europe as a whole. Since 2022, we have seen a full-scale high-intensity war on the borders of the European Union with hundreds of thousands of casualties, mass population displacement, huge economic costs and deliberate destruction of vital energy systems and cultural heritage. The outcome of that war will be a determinative factor in our collective future for decades ahead.

Europe faces other growing threats and security challenges, in its region and beyond. Strategic competition is increasing in our wider neighbourhood, from the Arctic to the Baltic to the Middle East and North Africa. Transnational challenges such as rapid technological change, migration and climate change could put immense stress upon our political and economic system. Authoritarian states like China increasingly seek to assert their authority and control in our economy and society. Traditional allies and partners, such as the United States, are also changing their focus away from Europe to other regions of the world. This is something that we have been warned about many times but is now happening faster than many had anticipated.

The moment has come for Europe to re-arm. To develop the necessary capabilities and military readiness to credibly deter armed aggression and secure our own future, a massive increase in European defence spending is needed. This needs to be coordinated and directed more effectively than ever between Member States, reflecting our collective strengths and addressing the weaknesses that come from uncoordinated action.

We need a stronger and more resilient defence industrial base. We need an ecosystem of technological innovation for our defence industries to keep pace with changes in the character of war. We need to learn the lessons from it and extrapolate to a possible large-scale conflict in the near future. We need faster and more efficient procurement. We need to find new ways of working with allies and partners who share the same goals.

Rebuilding European defence requires, as a starting point, a massive investment over a sustained period. Together we must accelerate work on all strands to urgently ramp up European defence readiness to ensure that Europe has a strong and sufficient European defence posture by 2030 at the latest, thereby also increasing our contribution to Trans-Atlantic security.

This White Paper provides a framework for the ReArm Europe plan, laying out the case for a once-in-a-generation surge in European defence investment. It sets out the necessary steps to rebuild European defence, to support Ukraine, address critical capability shortfalls and establish a strong and competitive defence industrial base.

For the short term, this White Paper lays out concrete options for collaboration among Member States to urgently replenish their stocks of ammunition, weapons and military equipment. This is also essential to maintain and enhance military support to Ukraine. As the White Paper outlines, support for Ukraine is the immediate and most pressing task for European defence. Ukraine is currently the frontline of European defence, resisting a war of aggression driven by the single greatest threat to our common security.

For the medium-longer term, it points to several critical capability areas, where gaps have already been identified by Member States in the EU and NATO's capability priorities' initiatives. It proposes that Member States urgently pool their efforts to address these gaps, including through a set of Defence Projects of Common European Interest, to be defined by Member States and that would benefit from EU incentives. EU support to collaborative capability development will thus facilitate EU Member States in NATO to deliver on their capability targets more quickly and economically and with enhanced interoperability from the outset. Finally, the White Paper suggests directions for strengthening the European defence technological and industrial base, stimulating research and creating an EU-wide market for defence equipment.

2. A RAPIDLIY DETERIORATING STRATEGIC CONTEXT

Threats to European security are proliferating in a way that poses an acute threat to our way of life. Even before Russia's invasion of Ukraine in 2022, there was growing consciousness of just how dangerous a security environment we operate in. This, in turn, has impacted our political system, and has had a negative impact on economic growth as people fear the consequences of a break of the international order due to the behaviour of hostile actors.

First, the European Union's geography and indeed history make it vulnerable to certain types of challenges in the wider European neighbourhood. Proximity to North Africa and the Middle East makes Europe a receptacle for the spill-over of the wars, migration, and effects of climate change that have afflicted these regions. To the north, the Artic is becoming a new arena of geopolitical competition. Across the Atlantic, the United States, traditionally a strong ally, is clear that it believes it is over-committed in Europe and needs to rebalance, reducing its historical role as a primary security guarantor.

Second, there are a wide range of different types of security threats that are increasingly inter-connected and increasing in prevalence. These include instances of terrorism and violent extremism, hybrid attacks, the actions of international organised crime groups and networks of cyber criminals. Evidence of connections between these groups and hostile state actors is growing, enabled by new technologies which easily transcend borders.

Third, one of the distinguishing factors of this new era is the extent to which these security challenges are strategic in nature and therefore require a strategic response. For example, Russia poses a major strategic threat on the battlefield. It has forced Europe and our partners to confront the reality of major mechanised high-intensity war on the European continent on a scale not seen since 1945. Russia – already the most heavily armed European state by a huge distance – is now running a war economy, focused overwhelmingly on the prosecution of its war aims, based on industrial mobilisation and technological innovation.

Meanwhile, the security implications of the rise of China are similarly strategic in nature. The challenge posed by China is systematic in that it is based on an entirely different – authoritarian and non-democratic – system of government to that of the EU. It is also systemic in that it is tied up with China's approach to trade, investment and technology by which it seeks to achieve primacy and in some cases supremacy.

In an era in which threats are proliferating and systemic competition is increasing, Europe must be strategic in its response. This requires us to harness the strengths of the European Union but also to address areas of comparative weakness, such as our ability to set clear central direction of travel. Otherwise, Europe will be less able to decide our own future and increasingly pushed around by large economic, technological and military blocs seeking to gain advantage over us.

In the short term, the future of Europe is being determined by the fight in Ukraine. In the medium to long-term, on the current trajectory some of the challenges we face will only become more acute. The rest of the world is engaged in a race towards military modernisation and technological and economic advantage. This race is intensifying, and Europe has yet to carve out a fully coherent response to meet the gravity of the current moment.

Russia will continue to scale up its war economy, supported by Belarus, the Democratic People's Republic of Korea and Iran. Russia has been massively expanding its military-industrial production capacity with an estimated spending in 2024 of 40% of the Russian federal budget and up to 9% of its GDP (up from 6% in 2023) on defence. In 2025, Russia is expected to surpass Member States' defence spending in purchasing power parity terms. In addition to that, Russia has made it clear that according to their understanding they remain at war with the West. If Russia is allowed to achieve its goals in Ukraine, its territorial ambition will extend beyond. Russia will remain a fundamental threat to Europe's security for the foreseeable future, including its more aggressive nuclear posture and the positioning of nuclear weapons in Belarus. Russia is exploiting a network of systemic instability, including through close cooperation with other authoritarian powers. It is persistently fuelling tensions and instability in Europe's neighbourhood, whether it is in the Western Balkans, Georgia, Moldova or Armenia and has a growing destabilising influence in Africa.

While **China** is a key trading partner for the EU, it is increasing defence spending, with a lack of transparency around its military build-up. It now has the second highest military spending in the world, surpassing all other East Asian countries combined. It is rapidly expanding its military capabilities, including nuclear, space and cyber capabilities. This shift is significantly altering the strategic balance in the Indo-Pacific. China's military and defence industrial modernisation is both quantitative and qualitative. China is intensifying its political, economic, military, cyber and cognitive measures to coerce Taiwan, while remaining below the threshold of direct confrontation. The shifting Taiwan status quo raises the risk of a major disruption which would have profound economic and strategic consequences for Europe. In addition, China's actions in the East and South China Seas are destabilising the region, while its growing military projection in the South Pacific and Indian Ocean is raising concerns among European partners.

Geopolitical rivalries fuel more instability in several parts of the world. This not only affects European security, but it also puts our economy at risk. In the **Middle East**, both the ceasefire in Gaza and the fall of the Assad regime in Syria provide opportunities to reduce regional tensions and end human suffering. This could also reduce economic insecurity and avoid spillovers, including around the Red Sea. Iran's direct link with Russia, its military ambitions, its support to proxy forces and its role in destabilising the region continue to be a serious concern for European security. The fragile situation in Israel/Palestine, Syria and Lebanon will have to be closely monitored, to avoid renewed tensions.

Conflicts, instability and growing violent extremism across **Africa**, including in the Sahel, Libya and Sudan, have direct security and economic implications for Europe and will continue to breed instability.

The **growing hybrid threats** include cyber-attacks, sabotage, electronic interference in global navigation and satellite systems, disinformation campaigns and political and industrial espionage, as well as weaponisation of migration. Sabotage activities in the Baltic and the Black Seas are on the rise. Marine and maritime activities and associated traffic and critical undersea infrastructure are under threat. Europe's freedom of action in air and space is also increasingly threatened.

Geopolitical rivalries have not only led to a new arms race but have also provoked a **global technology race**. Technology will be the main feature of competition in the new geopolitical environment. A handful of critical and foundational technologies like AI, quantum, biotech, robotics, and hypersonic are key inputs for both long term economic growth, and military pre-eminence. Boosting innovation is key for this. As such, technology diffusion for commercial purposes must be reconciled with more rigid technology ecosystems to advance national security objectives. The EU's strategic competitors are heavily investing in this area.

The same applies to security of supply of **critical raw materials,** fundamental for our economic and industrial production, defence capabilities and competitiveness. They are increasingly a cause for competition and conflicts and part of power politics, as excessive dependencies can be exploited. As an example, an escalation of tensions in the Taiwan Strait could cut the EU off from access to key materials, critical technologies and components.

In a harsher world of hyper-competitive and transactional geopolitics, reaching across different theatres, the EU needs to be able to effectively counter any challenge and be ready, even for the most extreme military contingencies such as armed aggression.

3. EUROPEAN READINESS 2030

Given the changes in the strategic environment it is important for Europe to build-up sufficient deterrence capacity to prevent a potential war of aggression.

Member States will always retain responsibility for their own troops, from doctrine to deployment, and for the definition needs of their armed forces. Furthermore, the EU will always act in a way that is without prejudice to the specific character of the security and defence policy of certain Member States and taking into consideration the security and defence interests of all Member States.

However, there is a lot the EU can do to support and coordinate Member States' efforts to strengthen the defence industrial base and the EU's overall defence readiness, including European contributions to NATO's deterrence and collective defence. By creating the necessary conditions to massively frontload investment in defence sector, providing necessary predictability to industry and reducing red-tape, the EU will support Member States to achieve full readiness in 2030.

The EU complements and multiplies Member States' individual efforts. Regardless of the format chosen by Member States, undertaking collaborative projects will enhance coordination, thus generating economies of scale and improving delivery timelines. In turn, this will boost the production capacity of European defence industry.

The EU is bringing value-added by:

- facilitating greater collaboration and efficient scale for the European defence industry in developing, producing and marketing weapons systems,
- facilitating efficiencies, interchangeability and interoperability, lowering costs by avoiding competitive purchasing and improving purchasing power for Member States, while helping to generate stability and predictability with multi-year industrial demand,
- supporting dual-use infrastructure for mobility and space-based communications, navigation, and observation,
- enabling partnerships.

This White Paper will be followed by the Preparedness Union Strategy, which will set out an integrated all-hazards approach to preparedness for conflicts and crises, and the EU Internal Security Strategy, which will provide a comprehensive and unified framework to prevent, detect and respond effectively to security threats.

4. CLOSING THE GAPS

To credibly deter foreign armed aggression and address the fallout of instability and conflict, EU Member States need to have the capabilities necessary to conduct the entire spectrum of military tasks. Today, Member States suffer from critical capability gaps that affect the execution of complex military operations over a sustained period. Given the rapid deterioration of the geopolitical context and rising tensions, Europe needs to acquire the necessary assets in a reasonably short timescale.

Rebuilding European defence requires action across several dimensions, in close coordination with NATO. Urgent action and investment are needed to replenish Member States' depleted stocks of military hardware and equipment. Going forward, developing large-scale, pan-European cooperation to address critical capability gaps in priority areas is a strategic necessity that will take several years to accomplish – so it is all the more urgent to intensify such efforts now.

Critical Capability Gaps

Closing critical capability gaps requires: 1) a shared understanding among Member States on the most urgent capability investment priorities, in light of the recent guidance from the European Council; 2) a stable and long-term commitment to tackle them; 3) a clear agreement among Member States on the governance framework for each type of capability, which may vary from one to another; and 4) EU funding and incentives to help Member States mobilise the necessary budgetary resources and spend them in the most efficient and targeted way.

The EU already:

- helps Member States to identify EU-level capability shortfalls and priorities,
- supports Member States in initiating new capability projects, starting with the harmonisation of requirements. The Multi-Role Transport Tanker Fleet is a successful example,
- supports the aggregation of demand through collaborative procurement, paving the way for the industrial phase, and undertaking joint procurement on Member States' behalf and at their request (e.g. 155mm ammunition for Ukraine),
- enhances cooperation through the Permanent Structured Cooperation (PESCO) to implement capability and operational defence projects.

Defence capability domains

Based on the defence capability gaps already identified by Member States, this White Paper sets out seven priority areas which are critical to build a robust European defence. The priority capability areas are the following:

Air and missile defence: an integrated, multi-layered, air and missile defence that protects against a full spectrum of air threats (cruise missiles, ballistic and hypersonic missiles, aircraft and UAS).

Artillery systems: advanced fire systems including modern artillery and long-range missile systems designed to deliver precise, long-range attacks against land targets (deep precision strike).

Ammunition and missiles: building on the European External Action Service initiative "Ammunition Plan 2.0", a strategic stockpile of ammunition, missiles and components along with sufficient defence industrial production capacity to ensure timely replenishment.

Drones and counter-drone systems: unmanned systems, including aerial, ground, surface and underwater vehicles that can be controlled remotely or operate autonomously using advanced software and sensors and enhance the capabilities that these technologies enable (e.g. situation awareness, surveillance, …).

Military Mobility: an EU-wide network of land corridors, airports, seaports and support elements and services, that facilitate the seamless and fast transport of troops and military equipment across the EU and partner countries.

AI, Quantum, Cyber & Electronic Warfare: defence applications using military AI and quantum computing; EU-wide advanced electronic systems designed to a) protect and ensure the unhindered use of the electromagnetic spectrum for land, air, space and naval forces and operations; b) suppress, disrupt and deny the use of the electromagnetic spectrum by an opponent; and c) protect the freedom to operate in cyber space and ensure unhindered access to cyber capabilities. Both defensive and offensive cyber capabilities are needed to ensure the protection and freedom of manoeuvre in cyberspace. There is a need to develop together with Member States a voluntary support scheme for offensive cyber capabilities as credible deterrence.

Strategic enablers and critical infrastructure protection: including but not limited to Strategic Airlift and Air-to-Air refuelling aircraft, intelligence and surveillance, maritime domain awareness, use and protection of space and other secure communications assets and military fuel infrastructure

Reaping the "collaborative dividend"

There is a strong case for closing these capability gaps in a collaborative manner.

Both the Niinistö and the Draghi Reports highlight that lack of collaboration has led to inefficiencies in the development of defence capabilities and imposed additional costs on all Member States. As a result, opportunities are missed to leverage European economies of scale to lower unit costs. Low and fragmented Member States' defence spending on innovation negatively impacts emerging disruptive technologies that are vital for future defence capabilities.

Capability gaps can be closed through the acquisition of capabilities for high-intensity warfare in line with EU and NATO capability processes. The scale, cost and complexity of most projects in these areas go beyond Member States' individual capacity. Thus, coordinated action benefiting from support of the whole EU toolbox would facilitate cost-effective procurement and prompt the ramp-up of European defence industrial capacity, strengthening our technological base including defence technology innovation.

Collaborative procurement is the most efficient means to procure large numbers of 'consumables' such as ammunition, missiles and drones. But collaborative procurement is also key to deliver on more complex projects since aggregation of demand constrains costs, sends clearer demand signals to market participants, shortens lead times and ensures interoperability and interchangeability. Since 2007, in the framework of the European Defence Agency (EDA), Member States have agreed a common target of 35% of total defence equipment procurement to be done collaboratively. This target has been mirrored in the commitments of the PESCO, launched in 2017.

Different collaborative formats and frameworks are available to Member States. These formats include but are not limited to: ad-hoc multinational cooperation such as a 'lead nation' framework; the European Defence Agency, the NATO Support and Procurement Agency or the Organisation for joint armaments cooperation (OCCAR). If so requested by Member States, the Commission could also act as central purchasing body on behalf of Member States.

Military Mobility and Infrastructure

Military mobility is an essential enabler for European security and defence and our support to Ukraine. It enhances the ability of Member States and allies' armed forces to swiftly move troops and equipment across the EU in case of conflict or intensified hybrid warfare. This will demonstrate our readiness and deterrence. Strengthening the logistics of the armed forces also matches the need to make our economy more connected and competitive – a perfect fit in terms of dual use. Although significant progress has been made in recent years, there remain considerable obstacles to moving troops and equipment unhindered across the EU.

Military mobility is impeded by red tape, often requiring both diplomatic clearance specific to military transports and compliance with regular administrative rules and processes. Current non-harmonised procedures, including customs, often cause severe delays in the issuance of cross-border permissions. To accelerate Europe's independent deterrence and our support to Ukraine, the EU and Member States need to immediately simplify and streamline regulations and procedures and ensure priority access for the armed forces to transport facilities, networks and assets, also in the context of maritime security.

For their movements, the armed forces need access to critical transport infrastructure that is fit for a dual-use purpose. They need both the availability of all transport modes and multiple routings across the European Union and connections to partner countries. For this reason, the EU has identified four priority multi-modal corridors (rail, road, sea and air) for military mobility for short-notice and large-scale movements of troops and equipment. These corridors need substantial and urgent investments to facilitate the movement of troops and military equipment. Within these four priority corridors, 500 hot-spot projects have already been earmarked that need to be upgraded urgently (such as widening railway tunnels, reinforcing road and railway bridges, expanding port and airport terminals). Their security, maintenance and repair also need to be assured. The EU and Member States need to identify possible immediate and future energy supply bottlenecks together with relevant partners, in particular NATO.

Military mobility can also be further strengthened by increased availability of specialised and dual-use transport assets in all transport modes. The EU can add value by facilitating the joint procurement, pre-contracting assets and using uniform design standards for dual-use and defence and security capabilities. Strengthened cooperation with EU industries would allow to increase supply of such critical assets and maintain lead market position of European companies offering dual use technologies.

The Commission, in consultation with the High Representative, will review all existing EU legislation impacting military mobility, including stricter rules towards the ownership and control of such critical transport infrastructure, will map and upgrade the necessary dual-use and critical transport infrastructure and will consider appropriate actions to remove persistent obstacles and secure access of military to specialised transport assets. Long-term dual-use infrastructure projects would also benefit from greater financial predictability.

The EU will adopt a Joint Communication on Military Mobility, including the necessary legislative proposals, this year.

Border protection

The defence of all EU land, air and maritime borders is important, in particular as regards the EU Eastern border. The project for an Eastern Border Shield is a noteworthy exercise by a number of Member States to confront the growing challenges in that region. It would establish an integrated land border management system that is designed to strengthen the EU's external land border with Russia and Belarus against military and hybrid threats. That would include a comprehensive mix of physical barriers, infrastructure development and modern surveillance systems.

Defence Omnibus

Regulatory simplification and harmonisation must focus both on rules and procedures that are specific to the defence sector, and on the impact on the defence industry of EU policies and regulations that are not defence-specific, but which impede the European defence technological and industrial base (EDTIB) from responding with maximum agility to the current heightened needs.

The Commission will immediately launch a **Strategic Dialogue with the defence industry** to discuss possible measures in these areas, identify regulatory hurdles and address defence industry challenges. In this context, the Commission will invite the EDA and the EU Military Staff to share their expertise, as appropriate. Based on the outcome of this dialogue, the Commission will present a dedicated Defence Omnibus Simplification proposal by June 2025. This will, in particular aim at:

- increasing the cross certification of defence products and facilitating mutual recognition of certification where appropriate;
- enabling the rapid grant of construction and environmental permits for defence industrial projects as a matter of public-interest priority;
- ensuring the timely and lawful availability and usability of all necessary materials and other inputs in the supply chain of the EDTIB, in particular for essential uses for which adequate substitutes are not available;
- removing obstacles to the availability at relevant times and locations of military personnel
- removing obstacles related to access to finance, including ESG investment;
- facilitating the exchange of confidential and sensitive information under conditions that ensure both simplicity and security of handling;
- the streamlining of EU defence industrial programmes to reduce the delivery time, simplify the management of EU-funded projects and simplify the treatment of Member States' co-funding.

In this context, the EU directives on defence and sensitive security procurement and on intra-EU transfers of defence-related products will also be subject to regulatory simplification and harmonisation. Based on its mid-term review, the aim should also be to simplify and speed up the rules and procedures of the European Defence Fund.

Strategic stockpiles and readiness pools

The EU together with Member States can support the creation of strategic stockpiles and defence industrial readiness pools. The European Defence Industry Programme, EDIP, will support such efforts according to three action lines. First, by supporting industrial actions for the development of cross-border industrial partnerships to coordinate reserves of defence products, components and related raw materials. Second, by supporting procurement actions to build strategic reserves of relevant components and raw materials. Third, by supporting the creation of optimally located strategic reserves (or Defence Industrial Readiness pools) of EU-made defence products.

5. INCREASED MILITARY SUPPORT FOR UKRAINE ("Porcupine strategy")

Since February 2022, the EU and Member States have provided around EUR 50bn in military support to Ukraine, including through the European Peace Facility. This support has been critical to sustain Ukraine's war effort. Ukraine's resistance in the face of Russia's war of aggression has been remarkable. Ukraine's defence needs will continue to be high well beyond any short-term ceasefire or peace agreement. Ukraine will remain at the frontline of European defence and security and is the key theatre to define the new international order with its own security interlinked with that of the European Union. The EU and its Member States will need to enhance Ukraine's defence and security capacity through a "Porcupine strategy", so that it is able to deter any possible further attacks and ensure a lasting peace. It is thus imperative that the EU and its Member States urgently increase their military assistance to Ukraine.

The war of aggression has equally highlighted Ukraine's highly innovative and thriving defence industry with significant expertise in sectors like AI and drones as well as spare capacity in key domains. The can-do attitude and entrepreneurial spirit of young and dynamic Ukrainian companies can provide important impulses to Europe's competitiveness and to the development of enhanced European defence capabilities.

EU military support to Ukraine should focus on two mutually reinforcing priorities:

a. Step up EU military and other forms of assistance to Ukraine

As part of long-term security guarantees and in line with the initiative by the High Representative on enhanced military support to Ukraine, the EU and its Member States should cover the following:

- The provision of large-calibre artillery ammunition with a minimum objective of 2 million rounds per year. There is a critical, short-term requirement to fully fund ammunition deliveries to Ukraine throughout 2025, including through incentivised donations from stocks and procurement. Ensuring stable deliveries requires financial commitments now.

- The provision of air defence systems, missiles (including deep precision strike) and drones are priorities shared by Ukraine and Member States. Building on the Letter of Intent of November 2024, where 18 Member States affirmed their willingness to collectively fill urgent capability gaps in the short-term by procuring ground-based air defence systems and counter-unmanned aerial systems, a two-track 'Air Defence Initiative' should be launched with Ukraine, encompassing collective procurement and financial support to Ukraine for accelerated production of interceptors for short- and medium-range air defence systems.
- Drones are an indispensable capability in redressing the asymmetry of military resources in the field. The EU and its Member States should continue to support Ukraine's procurement of drones and further support the development of its own production capacity, including through joint ventures between European and Ukrainian industries.
- EU and Member States' efforts to train and equip Ukrainian brigades and actively support the regeneration of battalions must consolidate and continue to develop further and evolve into an essential element of the future military capacity development of Ukraine after any ceasefire. EUMAM Ukraine will continue to deliver training beyond the 75,000 beneficiaries to-date. Dedicated support and spare parts should also be provided, as close to operations as possible, for maintenance, repair and overhaul of battle-damaged equipment with a better adaption of military equipment sent to Ukraine to the realities on the ground. Equally, there will be significant benefits for European troops to learn from the frontline experience of Ukrainian forces.
- Direct support to Ukraine's defence industry is the most effective and cost-efficient way to support Ukraine's military efforts, notably through direct procurement orders from its defence industry by Member States for donation to Ukraine. The Ukrainian defence industry's estimated productive capacity will reach approximately EUR 35bn in 2025. To this end, Ukraine could use the EU loan which is part of the G7-led Extraordinary Revenue Acceleration (ERA) initiative. The Commission will take all necessary measures to frontload financing under this instrument, as well as under the Ukraine Facility, to maximise Ukraine's macro-economic margin for manoeuvre. The ERA frontloading will allow Ukraine to boost spending on military needs and to prioritise procurement in Ukrainian and European defence industries. In addition, the new Security Action for Europe SAFE instrument would allow the Ukrainian defence industry to participate in collaborative procurements on the same footing as EU industry.
- Enhanced Military mobility is needed to ensure smoother deliveries of military assistance. The EU's military mobility corridors should extend into Ukraine, which would enhance interoperability and serve as additional security guarantee to deter against future aggression.
- Enhanced access to EU space assets and services could be a key enabler to enhance Ukraine's defence capacities. The EU should proceed with Ukraine's request to participate to the EU Space Programme including access to space-based governmental services in the field of positioning, navigation, and timing, communications, and in Earth observation. The EU should also fund Ukrainian access to services that can be provided by EU-based commercial providers, including start-ups and scale-ups, in support of and upon demand of the Ukrainian Armed Forces. This will help Ukraine to enhance its resilience by diversifying its sources of space-based services. In addition, the EU and its Member States should closely cooperate with Ukraine on the protection of strategic assets (e.g. cyber threats targeting

space assets) and invite Ukraine to participate to the EU Space Information Sharing Analysis Centre (ISAC).

The EU Military Staff Clearing House Cell already contributes to coordination of the Member States' military support to Ukraine, in conjunction with the Ukraine Defence Contact Group and NATO's Security Assistance and Training for Ukraine. To reinforce such work, and to enhance it with greater industrial cooperation between EDTIB and the Ukrainian defence industry, the EU will propose to Ukraine to establish a cross-cutting Task Force.

b. Associate Ukraine to EU initiatives to develop defence capabilities and integrate the respective defence industries

The past three years have stimulated Ukraine to rapidly develop its military capacity. Ukraine is today using its experience from the frontline to continuously adapt and upgrade equipment to the point that Ukraine has become the world's leading defence and technology innovation laboratory. Closer cooperation between the Ukrainian and European defence industries will enable first-hand knowledge transfer on how to best use innovation to achieve military superiority on the battlefield, including on rapidly scaling up production and updating existing capabilities.

The EDTIB remains however at the forefront of the development of more advanced large-scale defence systems and technologies. The integration of the Ukrainian defence industry into the EDTIB will help it to scale up, modernise, consolidate, and provide cost-efficient defence products to the global market.

The rapid adoption of the EDIP draft Regulation is therefore a top priority. Once agreed, it will pave the way for Ukraine's integration in the European defence equipment market through a dedicated Ukraine Support Instrument (USI) and by opening the programme's activities to Ukraine's participation – consistent with what is now proposed for SAFE, under the different modalities of that instrument. In this context, the EU Defence Innovation Office in Kyiv could be scaled up to expand defence industrial collaboration, allowing the EU to support and profit from Ukraine's war experience and to further incentivise the direct investment by EU companies in the Ukrainian defence industrial market. Furthermore, the Commission and the High Representative recommend Member States to mandate the EDA to expand Ukraine's participation in its activities, including the Hub for EU Defence Innovation. Ukrainian participation in PESCO projects and in collaborative opportunities stemming from the Coordinated Annual Review on Defence (CARD) should also be encouraged.

The ensuing staff-to-staff interaction and cooperation between the EU, Member States and Ukraine would allow Ukraine to transfer some of its experiences with high-intensity warfare to the EU. The lessons would in turn inform and support the identification of future defence needs by Member States.

6. A STRONG & INNOVATIVE DEFENCE INDUSTRY IN EUROPE

The European defence industrial sector is an indispensable prerequisite of defence readiness and credible deterrence. Whereas several EU defence companies are globally competitive, the EU defence industrial base still has structural weaknesses. At present, the European defence industry is not able to produce defence systems and equipment in the quantities and speed that

Member States need. It remains too fragmented with dominant national players catering mostly to domestic markets. It has also suffered from under-investment and there is a need to increase our investment in and sourcing from the EU industrial sector. To support the defence industry to overcome these weaknesses, the revision process of the EU directive on defence and sensitive security procurement scheduled for 2026 will take into account the Competitiveness Compass recommendation to introduce a European preference.

Investing in European defence readiness not only guarantees us the peace of tomorrow; it is also an enabler of our competitiveness ambition for European manufacturing. Existing value chains or manufacturing capacities in our traditional industries – automotive, steel, aluminium or chemicals – can find new opportunities in repurposing and supplying a growing footprint of a defence industrial base, while new ecosystems and value chains for cutting-edge technologies – like AI or advanced electronics – can feed into both civilian and military applications.

Through targeted policies the EU should support the European defence industry across six strategic directions: a) supporting, reinforcing and promoting industrial capacities across the EU; b) securing the supply of critical industry inputs and reducing dependencies; c) building a true EU-wide Market for Defence equipment; d) simplifying existing rules and cutting red tape; e) boosting research and development to foster innovation; and f) keeping, attracting and developing talent, enhancing skills and expertise in the defence sector.

Aggregate demand to ramp up defence industrial production capacity

A massive ramp-up of European defence industrial production capacity is a prerequisite for Member States to be able to acquire the critical capabilities they currently lack. In addition to resolving supply-chain issues and logistic bottlenecks, scaling up production capacities depends on companies having a steady stream of solid, multi-year orders to steer investment in additional production lines.

Long-term orders are the best way to increase predictability for the European defence industry and provide the necessary long-term investment signals, as shown by the European defence industry reinforcement through common procurement act (EDIRPA) programme. To support this need, the EU can on the one hand foster more systematic aggregation of Member States demand in the EDA framework to prepare and structure joint procurement on a large scale and based on multi-year contracts supported by EU instruments. On the other hand, the Commission and the EDA can, in cooperation with the Member States, strengthen the dialogue with industry to provide them with predictability and better anticipate their aggregated needs, which would allow each industrial player to engage in output planning that would contribute to meeting those overall needs. This dynamic sharing of information on prospective demand and output ramp-up would also in turn allow the EU to better tailor support measures, to incentivise collaborative procurement and industrial ramp-up.

Additionally, availability of European defence equipment in time and volume is a pre-requisite for enhanced security, reduction of dependencies and increased competitiveness of the European Defence Industrial base. In line with the EDIP proposal, the EU intends to launch a pilot to gradually set up a European Military Sales Mechanism with the view to increase availability and delivery time for defence products from Europe.

Reducing dependencies and ensuring security of supply

Enhancing the resilience of EU defence value-chains is also key for defence readiness. The Commission set up the Observatory of Critical Technologies for space and defence value-chains to build knowledge of respective criticalities and systematically monitor them, and to develop relevant technology road maps.

In defence, industry access to critical inputs is a key factor. When the European market relies only on one or a handful of suppliers of key goods, services or other inputs, EU policies and investments should strengthen European economic security by minimising the potential for the weaponisation of dependencies or economic coercion. Thus, with the Strategic Dialogue with the European defence industry, the Commission, supported by the EDA, will aim to clearly identify the critical raw materials and key components (e.g. chips) that are most critical and the possible measures to ensure a diversification of supply sources with EU support.

In parallel, the planned creation of a platform for the joint purchase of critical raw materials will contribute to cost-effective and secure supplies. The EU will also support the development of home-grown alternatives for technologies, components and processes that it needs to control (e.g. through EDF projects or dual-use frameworks). It could seek and promote technology transfers if needed, to benefit from cutting edge technologies and state-of-the-art research, and initiate a long-term effort to address the issue of restrictions that are imposed on third-country technologies.

Building a true EU-wide Market for Defence equipment, simplifying and harmonising rules

As demonstrated in the Letta Report, the case for an EU-wide Market for Defence equipment has become much stronger and far more urgent. Member States are buying, compared to a decade ago, up to four times more equipment, often from non-EU suppliers. However, no European national defence market has the size required to sufficiently scale up the European defence industry.

Member States need to be able to fully rely on the EDTIB and European defence supply chains, especially in times of crisis and conflict. This means guaranteed access to defence products, components, and spare parts through a comprehensive security of supply regime.

A truly functioning EU-wide Market for Defence equipment would be one of the largest domestic defence markets in the world. Such a market would help achieve key objectives such as global competitiveness, readiness and greater industrial scale. EDTIB firms could have a larger defence industrial footprint throughout the EU, including in those Member States that are close to the most pressing security threat. It would also boost market opportunities across Member States through cross-border industrial collaborations, mergers and acquisitions or start-ups, thereby prompting more EU-made defence products.

Regulatory simplification and harmonisation must focus on rules and procedures for defence procurement, intra-EU transfers of defence-related products, mutual recognition of national certification permits and permit granting. In addition, the impact on the defence industry of EU policies and regulations that are not defence-specific needs to be reviewed.

Transforming defence through disruptive innovation

The potential of some technologies for defence superiority is an important lever that needs to be urgently strengthened at European level. New technologies are fundamentally changing the nature of warfare in several domains. AI, cloud and quantum computing, advanced and secure connectivity, autonomous systems and alternative energy sources have indeed the capacity to disrupt and transform traditional approaches to warfare. Innovations in drone technology are already dictating the way battles are fought, and the role of robotics is poised to grow, with autonomous ground vehicles taking the lead in early combat operations. These machines, capable of reconnaissance, direct assaults, and logistical support, are already having an impact on battlefields. AI powered military robots are still in early stages of development and there is ample opportunity for Europe to excel in robot weapons and the software required to power them. However, the window of opportunity is very narrow as strategic competitors and rivals are heavily investing in these areas, as well as in new technologically complex segments such as hyper-sonic missiles, directed-energy weapons, seabed and space warfare.

Member States need the European defence industry to be able to design, develop, manufacture and deliver these products and technologies faster and at scale. In the context of substantially increased defence expenditure, a higher share needs to be invested in defence research and development and technology, concentrating efforts and resources on common European projects. The EU should support the development of new and innovative industrial processes such as distributed design and manufacturing, additive manufacturing and the use of AI. To this end, the EU's Defence Innovation Scheme (EUDIS) and the Hub for European Defence Innovation (HEDI) could be leveraged. For example, EUDIS, developed under the EDF with a EUR 2 billion budget, proposes innovation support services for single entities, including through matchmaking with investors, partners and end-users, and supports innovative product and technology testing and validation. With increased funding, the EDA could use HEDI to run simultaneous experimentation campaigns to quickly promote the most innovative solutions and integrate them into existing or new capabilities through accelerated development loops. In parallel, Commission funds the EIF's Defence Equity Facility, which supports venture capital and private equity funds that are investing in European companies developing innovative defence technologies with dual use potential.

In the realm of deep tech, the distinction between civilian and defence is blurred. As a result, innovative civilian startups and relevant R&I results can play a crucial role in developing cutting-edge solutions that can significantly enhance military capabilities and improve operational readiness. Although Europe is a technological powerhouse, this does not yet translate into a capacity to fully leverage the potential of technology to gain military superiority. There is therefore urgency for the EU to mobilise its overall innovation capacity and direct significant investments to regaining edge and prevent being technologically dependent.

The EU will come forward with a European Armament Technological Roadmap, leveraging investment into dual use advanced technological capabilities at EU, national and private level. In an initial phase the EU will focus on AI and quantum. The Commission will also ensure that the European Innovation Council and the planned TechEU Scale-up Fund will invest in dual-use technologies.

SMEs play an ever more important role as agile providers of disruptive technologies and innovation in the defence community. The Commission has therefore taken action to support a more active contribution of SMEs to EU defence R&I, notably by providing dedicated EDF calls targeted at SMEs whilst encouraging their participation in all other projects. Cross-border cooperation involving SMEs is one of the award criteria of the EDF programme, and financial bonuses apply based on the level of involvement of SMEs for development actions. In the 2023 EDF calls, the participation of SMEs represented around 50% of the total number of entities, requesting 30% of total requested grant amount. For the period 2023-2027 it is estimated that EDF should fund SMEs with up to EUR 840 million. In addition, EDIP would provide for the creation of a Fund to Accelerate Defence Supply Chain Transformation (FAST). This new financial instrument could generate a multiple of the budget allocated to the initiative by EDIP in loans or equity investments.

The EU needs to mobilise its overall innovation capacity and direct significant investment to regain its edge, avoid becoming more technologically dependent and reap the benefits of spillover effects in other sectors of the economy. Europe is already home to some new innovative defence technological actors. To accelerate the emergence of European defence tech players, the regulatory environment needs to be more conducive towards risk-taking. The Commission will intensify the dialogue with new defence players and private investors to propose regulatory simplification measures as well as greater availability of risk capital and business opportunities.

Skills and talent to innovate

Closing the capability gaps includes covering the complete capability development cycle in the defence sector, from research to acquisition to operation and maintenance. The success of this approach relies on the availability of technological skills and innovative talent within the defence industry, including supply chain players from SMEs to prime contractors. Although the European defence sector has skilled and specialised employees, a large-scale defence industrial ramp-up will require industry to attract, train, employ, up- and reskill far more talent, from technicians to engineers and specialised experts. The Union of Skills foresees a Skills Guarantee for workers in sectors undergoing restructuring or at the risk of unemployment to have the opportunity to develop their careers in other sectors, including defence. Advanced STEM (Science, Technology, Engineering and Mathematics) skills are essential to develop next-generation capabilities, as also underlined in the Union of Skills, including notably the area of security and defence.

The fast and complex evolution of technologies is creating opportunities for new types of jobs and is demanding a renewal in skill sets. Defence industry employees will need to effectively process, exploit and disseminate data and exploit novel technologies in new capability areas such as autonomous systems, cybersecurity systems, intelligent information systems or high-performance computing systems. The European defence industry will need to compete with other sectors for similar skills while, at the same time, its expansion will create opportunities for reskilling / upskilling for redundant jobs from other industrial sectors.

7. A SURGE IN DEFENCE SPENDING

Member States's defence spending has grown by more than 31% since 2021, reaching 1.9% of the EU's combined GDP or EUR 326bn in 2024. Specifically, defence investment reached an unprecedented EUR 102bn in 2024, almost doubling the amount spent in 2021. Yet, on aggregate, European defence spending remains far lower than that of the US and, more worryingly, below that of Russia or China. Rebuilding European defence will require massive investment over a sustained period, both public and private.

With the ReArm Europe Plan, the Commission has identified five pillars to urgently and significantly step up European defence spending.

The 5 pillars will help address the most immediate needs and help mitigate the consequences of past under-investment.

(1) A new, dedicated financial instrument to support Member States' defence investments

Given the urgency, the Commission proposes a new EU regulation under Article 122 of the Treaty on the Functioning of the European Union to provide Member States with loans backed by the EU budget. With up to EUR 150bn, the Security and Action for Europe (SAFE) instrument will strongly support a significant increase in Member States' investments in Europe's defence capabilities, now and over this decade.

SAFE will support the European defence industry through common procurements involving at least two countries, out of which one shall be a Member State receiving SAFE financial assistance and the other may be another Member State, an EFTA State, member of the EEA or Ukraine. These common procurements would cover the priority capabilities and enablers identified by the special European Council of 6 March 2025. The simpler and most urgent of these capabilities, such as ammunition or military mobility, would be subject to eligibility conditions akin to those of the EDIRPA programme. More complex and high-tech systems, like AI or air defence, would be subject to stricter conditions inspired by the legislative discussions on EDIP, in light of the higher requirements for strategic autonomy.

Allocations are available to all Member States. They will be demand-based and underpinned by national defence industrial plans. Once the respective plans are approved and the loan agreement signed, pre-financing will be available.

The instrument includes provisions to further incentivise and facilitate common procurement, such as the possibility of opening existing framework agreements and contracts for new partners and a VAT waiver for purchases financed by SAFE. It also promotes the use of common standards.

Other partner countries' entities and products can be eligible for common procurements subject to an agreement with the Union on financial conditions and security of supply.

(2) The coordinated activation of the National Escape Clause of the Stability and Growth Pact

The Commission Communication on 'Accommodating increased defence expenditure within the Stability and Growth Pact' proposes the coordinated activation of the National Escape Clause by all Member States to unlock additional flexibility for higher defence expenditure.

The flexibility will allow for a deviation from the agreed expenditure path equivalent to the increase in defence expenditure (including both investment and current expenditure) since 2021. A period of four years (extendable) is considered. Thanks to this flexibility, Member States could mobilise additional defence expenditure of up to 1.5% of GDP. Based on projections of gradual take-up, defence investment could reach at least EUR 800bn over the next four years, including the expenditure financed by the EUR 150bn from SAFE, which will be automatically eligible under the national escape clauses.

(3) Making existing EU instruments more flexible to allow greater defence investment

In the short term, the EU can do more to support the urgent need to increase European defence investments with the EU budget.

Cohesion policy already contributes to defence and security capabilities. It funds security and defence-related investments that contribute to regional development as defence industries often create research and development and industrial ecosystems which benefit Europe's regions and communities.

National, regional and local authorities can voluntarily use the mid-term review of cohesion policies to allocate funds within their current programmes towards emerging priorities, including strengthening defence and security capabilities.

In the context of the mid-term review of the 2021-2027 programmes, the Commission will propose next week a package of measures to provide flexibility and incentives towards this.

The development of a strong and resilient European defence industry will support European competitiveness and promote regional development and economic growth.

(4) Contributions from the European Investment Bank

The European investment Bank has a clear and decisive role to play in the funding of European defence. The EIB Group's Security and Defence Action Plan was an important first step and its implementation should accelerate.

In addition, the EIB intends to introduce changes to further widen the scope of its defence-related funding. It will double its annual investment to EUR 2bn, to fund projects such as drones, space, cybersecurity, quantum technologies, military facilities, and civil protection. It proposes a further adjustment of the Group's eligibility criteria, to ensure that excluded activities are more precisely defined and as limited as possible in scope in order to align with the new policy priorities of the EU. Finally, it will propose a revision of its operational framework and replace the ad-hoc Strategic European Security Initiative with a dedicated transversal public policy goal to contribute to Europe's peace and security, with an ambitious financial and capital allocation. These are further steps in the right direction.

(5) Mobilising private capital

Boosting public investment in defence is indispensable, but it will not be sufficient. European companies including Small and Medium Enterprises and Mid-Caps must have better access to capital, including guarantee instruments for de-risking investments, to bring their solutions to industrial scale and to drive the industrial ramp-up that Europe needs.

The financial sector shows a growing interest in defence. Yet, the defence sector remains an under-served market due to limitations in investment policies of public and private financial institutions. Access to finance remains a major concern for 44% of defence SMEs, which is much higher than for civilian SMEs. They have fewer opportunities than in the US or in the UK, and US investors represent 60% of the total.

The Savings and Investment Union should help channel additional private investment towards EU priorities, including the defence sector. It could, alone, attract hundreds of billions of additional investments per year in the European economy, boosting its competitiveness. To this end the Commission is putting forward a Communication on a Savings and Investments Union.

The EU's Sustainable Finance Disclosures Regulation (SFDR) does not prevent the financing of the defence sector. However, both the finance and defence sector may benefit from additional clarification on the application of the SFDR. The Commission will provide the necessary clarification in the context of the review of the SFDR, on the relationship of defence with the investment goals of the sustainability framework.

(6) Financial predictability

The Commission will continue to explore additional funding sources for defence at EU level and further elements and options to substantially boost financing for European defence and to strengthen the EDTIB.

Should demand by Member States for loan-based financing supported by the EU budget under SAFE outstrip supply, the Commission will continue to explore innovative instruments, such as in relation to the European Stability Mechanism (ESM).

Given the urgency and priority for Europe to rebuild its defence, underpinned by a competitive defence industrial base, the next MFF should provide a comprehensive and robust framework in support of EU defence.

It should support more and better collaborative investment, from research to development of complex systems, through commercialisation to procurement, with a view to increasing Europe's technological sovereignty.

8. ENHANCED SECURITY THROUGH PARTNERSHIPS

Security challenges often have global implications, requiring international cooperation. Russia's full-scale war against Ukraine has a wide-scale impact beyond Europe. Hybrid threats and cyber-attacks do not respect borders. Nor does security in space or at sea. The EU must therefore work closely together with international organisations and partner countries to address these threats effectively

Cooperation with partners is also key to tackle the challenges of European defence and European defence industry, including for diversifying suppliers and reducing dependencies. The EU's wide partnerships on peace, security and defence are a key source of strength and resilience. The EU remains fully committed to promoting international cooperation and strengthening effective multilateralism at all levels. We will further expand and refine our tailored partnerships with bilateral, regional and multilateral partners across the globe in a mutually beneficial way to address a wide range of security challenges, including in the field of capability development and innovation.

The EU will promote an open architecture combined with variable geometry allowing for the participation of like-minded partners in cooperative defence projects and initiatives, such as PESCO projects which will be encouraged on a case-by-case basis. This will contribute to reducing excessive dependencies due to relying only on one or a handful of suppliers of key goods, services or other inputs, and enhance European economic security and develop and promote European defence capabilities and the competitiveness of the EU's defence equipment market.

NATO remains the cornerstone of collective defence of its members in Europe. EU-NATO cooperation is an indispensable pillar for the development of the EU's security and defence dimension. The EU's unique tools of regulatory power and financial instruments help the 23 EU Member States in NATO to achieve their capability targets.

A strong transatlantic bond remains crucial for Europe's defence. The **United States** demands that Europe takes more responsibility for its own defence. These efforts shall continue to build on the deep and extensive transatlantic supply chain, which should be mutually beneficial. The bilateral dialogue on Security and Defence can be enhanced to further strengthen cooperation in fields such as cyber, maritime security and space, discuss procurement issues and tackle any other matters of mutual concern.

The **United Kingdom** is an essential European ally with which cooperation on security and defence should be enhanced in mutual interest, starting with a potential Security and Defence partnership. Building on the set of solid agreements in place, bilateral security and defence cooperation can expand, ranging from external crisis management to defence industrial policies.

Norway is a full partner in EU defence programmes through its contribution to the EU budget. The recently launched Security and Defence Partnership provides a comprehensive and structured political framework for strengthening further dialogue and cooperation.

Our cooperation with **Canada** has intensified and should be further enhanced, also to strengthen transatlantic security. The bilateral Security and Defence dialogue as well as the upcoming Security and Defence partnership provide the basis for enhanced security and defence cooperation, including on respective initiatives to boost defence industry production.

The EU should continue mutually beneficial engagement and cooperation in the field of security and defence with all like-minded **European, enlargement and neighbouring countries** (including Albania, Iceland, Montenegro, the Republic of Moldova, North Macedonia and Switzerland) to promote peace, security and stability on our continent and beyond.

Türkiye is a candidate country for accession to the EU and a longstanding partner in the field of Common Security and Defence Policy. The EU will continue to engage constructively to develop a mutually beneficial partnership in all areas of common interest based on an equal commitment on Türkiye's side to advance on a path of cooperation on all issues of importance to the EU, in line with the European Council conclusions of April 2024.

The EU should also explore opportunities for defence industrial cooperation with **Indo-Pacific partners**, notably Japan, and the Republic of Korea with which Security and Defence Partnerships were concluded last November, as well as Australia and New Zealand.

Security and defence cooperation with **India** has developed over the past years, including through regular Security and Defence Consultations. The EU and India will further explore a Security and Defence Partnership. The EU remains committed to upholding peace and security in the Indo-pacific region, including maritime security and by tackling traditional and non-traditional security threats and safeguarding sea lanes of communication and upholding freedom of navigation.

9. THE WAY FORWARD FOR EUROPEAN DEFENCE

The geopolitical context and Europe's threat landscape are changing dramatically and at an unprecedented speed. Since the Versailles Summit in March 2022, Member States have agreed on the need to shoulder a greater responsibility for defence. Several steps have already been taken towards more intense cooperation on defence. Still, the aggravation of threats looming over Europe requires the EU to stand firm, be united and act with decisiveness, ambition and speed.

This White Paper sets out a comprehensive plan to rearm Europe and build up its defence to tackle these threats, notable as immediate actions:

- Member States are invited to request the activation of the National Escape Clause by the end of April.
- The Council is invited to adopt the proposed draft Regulation on Security and Action for Europe (SAFE) as a matter of urgency.
- The co-legislators are invited to adopt the European Defence Industry Programme (EDIP) before Summer, including its Ukraine Support Instrument (USI).
- The co-legislators are invited to consider with priority the changes to the European Regional Development Fund that will by proposed by the end of March 2025. Following the mid-term review of cohesion policies, national, regional and local authorities will be able to voluntarily allocate funds within their current programmes towards emerging priorities including strengthening defence and security capabilities.
- Member States are invited to swiftly step up collaborative defence procurement in line with the target of at least 40% proposed by the European Defence Industry Strategy (EDIS), including under the aegis of the SAFE instrument.
- Member States are invited to swiftly agree on an ambitious new military support initiative for Ukraine, including artillery ammunition, air defence and 'train and equip'.
- The Commission will promote the integration of Ukrainian defence industry into the Single Market, support the extension of military mobility corridors into Ukraine and explore Ukraine's access to EU space-based governmental services.
- The Commission calls on the Board of Governors of the European Investment Bank to urgently step up support to the European defence industry, notably by further narrowing the list of excluded activities and increasing the volume of available funding.
- The Commission will immediately launch a Strategic Dialogue with the defence industry, also calling on the expertise of the EDA or the EU Military Staff as appropriate.
- The Commission will present, by June 2025, a Defence Omnibus Simplification proposal.
- The EU will present a European Armament Technological Roadmap on investment into dual-use advanced technological capabilities in 2025.
- The Commission and the HR will adopt, by end of 2025, a Joint communication on Military Mobility, accompanied by the necessary legislative proposals.

The EU is and remains a peace project. It must be able to protect its citizens, defend its interests and the values it stands for. Ukraine deserves continued military support to defend itself against continued military aggression and to ensure that it can defend itself in the future. A surge in defence investment would have positive spillover effects across the economy, contributing to competitiveness, job creation and innovation in many sectors, from aeronautics to shipbuilding, from steel to space, transport to AI. Harnessed correctly, this could lead to a major leap in European resilience in a world where threats are proliferating.

Europe must make bold choices and build a Defence Union that ensures peace on our continent through unity and strength. It owes it to its NATO allies, to Ukraine and primarily to itself, European citizens and to the values it stands for. The EU and its Member States must rise to this historic challenge.

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