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COVER NOTE

From: Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director

To: Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union

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HIGH REPRESENTATIVE
OF THE UNION FOR
FOREIGN AFFAIRS AND
SECURITY POLICY

Brussels, 16.10.2025
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**JOINT COMMUNICATION TO THE EUROPEAN PARLIAMENT, THE
EUROPEAN COUNCIL AND THE COUNCIL**

Preserving Peace - Defence Readiness Roadmap 2030

1 – Introduction

What Europe and its Member States do for the rest of this decade will shape the security of the continent for the whole century. By 2030, Europe needs a sufficiently strong European defence posture to credibly deter its adversaries and respond to any aggression. **To be “2030 ready”, Europe needs to move now.** This is why, at the June European Council, EU Heads of State or Government invited the Commission and the High Representative “*to present a roadmap*” “*to review progress [on the White Paper] at its October 2025 meeting and discuss the next steps in the implementation of its defence readiness objective.*”

This Roadmap translates the White Paper and the guidance provided by the European Council into clear objectives, milestones with concrete dates for deliverables, and indicators to track progress. It proposes European flagship where urgency is greatest, to focus efforts, in accordance with international commitments, including NATO targets.

Defence readiness entails developing and acquiring the **capabilities that are needed for modern warfare**. It means ensuring that Europe has a defence industrial base that gives it a strategic advantage and the independence needed. And it means being ready to deliver cutting-edge innovation and fast, mass production at critical times.

The need to speed up and ramp up efforts reflects the increasing dangers of today, as well as the **evolving threat landscape** which Europe and its Member States must contend with, adapt to, and prepare for. This starts with Russia’s unprovoked, full-scale military aggression against Ukraine, which is reaching new heights of brutality and violence. Reckless provocations and acts of hybrid warfare against Member States, from cyber-attacks to violation of air space are increasing. Russia has militarised its economy and society. In 2025, its declared defence budget will surpass 7% of GDP. Around 40% of its budget in 2025 is for security and defence. This militarised **Russia poses a persistent threat to European security for the foreseeable future.**

Europe’s readiness must be rooted in the wider global context with a 360° approach. We cannot be blind to threats from other parts of the world. The international order is being challenged. Strategic competition is increasing in our immediate and wider neighbourhood, but also far beyond. From Gaza and the Middle East to several latent or open conflicts in Africa, from increasing tensions in the Asia-Pacific to the Arctic, flashpoints are multiplying. Authoritarian states are increasingly interfering in our societies and economies. Traditional allies and partners are shifting their focus to other regions of the world. Finally, we must contain horizontal threats such as terrorism, proliferation of weapons of mass destruction and the security consequences of climate change.

To ensure peace through deterrence, Europe’s defence posture and capabilities must also be ready for the battlefields of tomorrow, in line with the changing nature of warfare. Technological innovation and iteration – developed at speed and scale and building on dual-use solutions – will dictate strength on the battlefield. Those that develop their own technologies will be the strongest and least dependent, notably for the critical systems of modern warfare, such as drones, satellites or autonomous vehicles. **Ukraine** remains Europe’s first line of defence and is an integral part of Europe’s defence and security architecture, and the EU will continue the support and intensified cooperation with Ukraine.

Member States must urgently equip themselves with an independent interoperable strategic capacity, collectively developed and maintained, capable of responding in real time to any threats to Europe's territorial integrity and sovereignty. The EU and its Member States must be able to act independently and take responsibility for their own defence and security without relying too much on others. They must contribute positively to global and transatlantic security, in close partnership with NATO. A Europe that is readier to ensure its own defence is a Europe more coordinated with NATO and more able to take its fair share in the transatlantic alliance. In all the areas of this Roadmap, EU-NATO cooperation is key, as the transatlantic alliance remains an indispensable pillar of the security of the EU. It will ensure maximum coherence and mutual reinforcement, while avoiding unnecessary duplications.

This should build on the work already started. **Europe has turned the corner on decades of under-investment in defence.** Member States increased defence budgets from EUR 218 billion in 2021 to EUR 343 billion in 2024, projected to reach EUR 392 billion in 2025. Defence investments rose by 42% in 2024, with EUR 106 billion allocated, and procurement of new equipment reached EUR 88 billion. New EU instruments were presented, like the European Defence Industry Programme, and a new strategic framework was provided with the White Paper for Defence Readiness. The ReArm Europe agenda will mobilise up to EUR 800 billion for defence, including through new funding instruments such as SAFE. The spending commitments undertaken by Allies at the June 2025 NATO Summit to reach the new core defence spending target of 3.5% GDP by 2035 will require sustained expenditure in the next decade of at least additional EUR 288 billion each year. This increased spending must pay off in terms of jobs, innovation and competitiveness in Europe.

Member States are and will remain sovereign for their national security and defence. They are responsible for defining the capability objectives required to ensure the readiness of their national armed forces so that they can fulfil their strategic-military missions, including those undertaken within NATO. Their respective national objectives and the associated timelines for achieving them are a sovereign decision.

At the same time, the complex threat landscape points to the need for Member States to act together, rather than fragmenting efforts across uncoordinated national initiatives. So far, still less than 50% of defence equipment is procured within the EU, and overwhelmingly at a national level while non-European suppliers have gained in market share.

Therefore, there is a clear need to invest more, invest together and invest European.

2 – What does defence readiness mean?

Achieving full defence readiness means that Member States' Armed Forces can anticipate, prepare for and be able to respond to any defence-related crisis, including high intensity warfare. It requires well-equipped and resourced armed forces that are coherent and interoperable, adequate training and a doctrine for the use of military force.

In a nutshell, Europe's readiness demands that collectively it reaches the capability targets based on Member States' undertaken commitments, including within NATO.

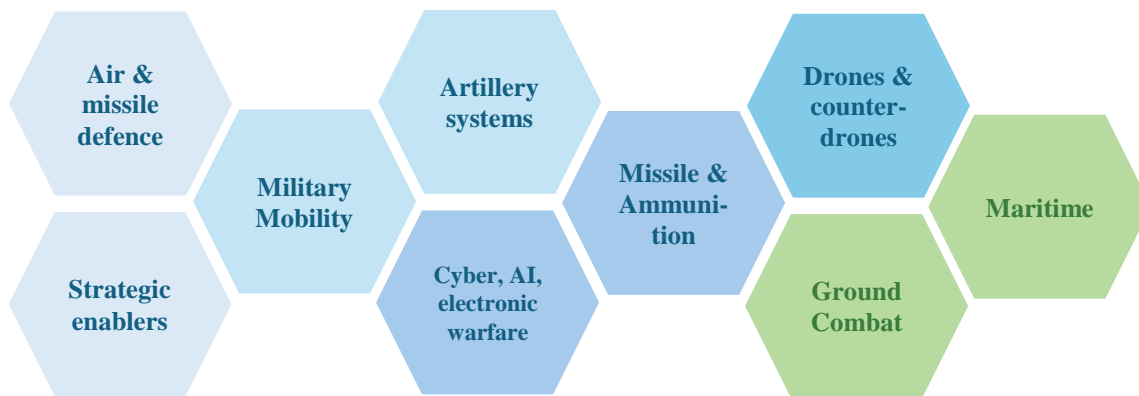
It also depends on a strong, resilient and innovative industrial and technological European industrial base. This in turn needs the right regulatory framework, a continent-scale market,

increased military mobility, more innovation and skills, and an expanded network of defence partnerships with allies and partners. In a broader sense, defence readiness further requires a robust enabling civilian environment, based on resilient societies, well-prepared and informed citizens, and enhanced civil-military cooperation¹. While focusing on capabilities, this Roadmap also addresses these other essential conditions for Europe's defence readiness.

It aims to bring together the work undertaken by Member States at national, multinational and EU-levels, and the processes launched by the Commission through ongoing and new defence-related instruments.

3 – Closing Europe's capability gaps by 2030: key steps and milestones

At the core of the readiness objective is ensuring that Europe has the full spectrum capabilities needed to deter any aggression and to defend its borders by land, air and sea, as well as its networks and assets in cyber and outer space. Member States have identified the following **initial priority capability areas**:



Defining and tracking Member States operational needs

Delivering on the joint objective of defence readiness by 2030 requires a systemic approach. Maximum interoperability and complementarity of the military capabilities acquired are essential. The EU Military Staff (EUMS) is carrying out a classified overview of the current state of play of Member States' capabilities and objectives. This includes the priority capability areas and takes into account NATO targets as well as Ukraine's needs. The overview will deliver quantitative insights on the existing capability shortfalls across the full spectrum of military operations, including territorial defence.

The overview will be updated on a yearly basis and will be integrated into the Coordinated Annual Review on Defence prepared by the European Defence Agency (EDA) and supported by the EUMS. This will ensure the link between the analysis of military capability shortfalls and the priority capability areas for procurement and development. Chiefs of Defence Staffs will regularly review in a classified setting the outcome of the analysis to inform further work by National Armament Directors and Capability Directors on proposed solutions. It is therefore key that Member States continue to share aggregate

¹ The Preparedness Union Strategy (JOIN(2025) 130: Joint Communication on the Preparedness Union Strategy, 26 March 2025) therefore complements this Roadmap.

information on their objectives and progress with the EUMS. While classified, this information will allow collective progress to be monitored in line with the Readiness 2030 Roadmap.

Building on this process, the Commission and the High Representative will present an Annual Defence Readiness Report to each October European Council. It will focus on the aggregate situation at EU level for the agreed priority capability areas, and the other issues set out in this Roadmap. The Report will provide an update on collective progress across key indicators which are proposed in this Roadmap and will be consulted with Member States. The Report will allow Leaders to review collective progress on this basis and provide strategic guidance to Defence Ministers' discussions in the Foreign Affairs Council in Defence format.

Capability development through Member States Capability Coalitions

The key for Europe's defence readiness is to close the existing critical capability shortfalls by developing and procuring defence capabilities in all the agreed priority areas.

For this, Member States should swiftly complete the ongoing process of forming Member States Capability Coalitions. They should detail which Member States will tackle which shortfalls and agree on the governance of each coalition, the role of lead and co-lead nations, the capability objectives and the collaborative projects to be launched to achieve them. Within these coalitions, Member States will always remain sovereign in deciding their role and contribution. Building on existing EDA-led Priority Implementation Roadmaps², each capability coalition should set out specific objectives and timelines.

Capability Coalitions should remain open to other Member States that wish to join at a later stage. Co-leadership should be encouraged to ensure Member States' ownership and appropriate burden-sharing. Each coalition may use one or several of the tools available in EDIP³ to trigger targeted EU support for flagship projects, as well as possible new PESCO projects. Horizontal guidelines could facilitate the work of these coalitions, regarding the role of lead nations, relations between co-leaders if needed, membership, implementation plan, link with the EU actors and reporting mechanism.

Existing processes should be used as much as possible. Under Member States' guidance, the EDA will play a central role to facilitate the Coalition process, notably through the Capability expert groups. The EUMS work on capability shortfalls will also inform the process. The Commission will ensure the link between coalitions and EU funding instruments and policies. The Foreign Affairs Council in Defence format will ensure political steer. Given the urgency, Member States should report by early 2026 to the Council.

The rapid mobilisation of the new **SAFE** Instrument and other EU and national tools will be vital to ensure the timely procurement of the most important capabilities within the coalitions – jointly as much as possible. This requires working at speed, as the **SAFE Regulation** sets out tight deadlines, which must be respected to remain on course for 2030.

² Each of the 22 areas identified in the Capability Development Priorities (November 2023) has a roadmap.

³ E.g. European Defence Project of Common Interest (EDPCI) or Structures for European Armament Programmes (SEAP) when in force.

A crucial variable will be the degree to which Member States can coordinate needs, aggregate demand and organise **joint procurement**. Defence procurement remains overwhelmingly national. This leads to fragmentation, cost-inflation and lack of interoperability. In 2007, Member States agreed to dedicate 35% of their defence investment to collaborative procurement⁴. Yet, it remains below 20%. **Increasingly gearing defence investment towards joint procurement** will be a key factor for readiness, as demand aggregation and economies of scale will help ramp up European defence industry production capacity and foster interoperability. Aggregating European demand will lower costs by avoiding that Member States outbid each other and will improve their overall purchasing power. It will also enhance scale effects and support ongoing efforts to collectively secure and ramp-up key production nodes and supply chains.

Objectives:

It is proposed that Member States should collectively fill capability shortfalls by 2030. In addition, the share of joint procurement should converge towards the agreed 35% target and defence investment procured from the EDTIB should reach the political target of at least 55% of the total investment.

Milestones:

1. Set up Capability Coalitions in all priority areas, decide on lead and co-lead nations, and on respective implementation plans until 2030 – by Q1 2026
2. Collect initial data on EU's defence industrial capacity in the priority capability areas, supported by the Commission as appropriate – by mid-2026
3. Launch projects in all priority areas within the first half of 2026
4. Organise at least 40% of defence procurement as joint procurement – by end 2027
5. Ensure that projects, contracts and financing are in place to close critical capability shortfalls in the prioritised areas – by end 2028
6. Receive all SAFE-funded procurements, contributing to close all capability shortfalls in the prioritised areas – by end 2030

Indicators:

It is proposed that the Annual Defence Readiness Report monitors the evolution of collective EU Military shortfalls per priority capability area (compared to previous year) and the number of projects launched and capabilities procured per priority area, based on information provided by the EUMS and EDA.

4 – Launching European Readiness Flagships

While progress is needed across all the defence capabilities areas, there is an urgent need to invest massively and in a coordinated manner in pan-European projects that will shield Europe as a whole against those pressing threats.

Therefore, the Commission and the HRVP propose **a set of initial European Readiness Flagships** that are pan-European by nature. They will benefit the security of Europe as a

⁴ Within the European Defence Agency. In 2017, it became a PESCO more binding commitment.

whole and will be mutually reinforcing: **the European Drone Defence Initiative**, the **Eastern Flank Watch**, the **European Air Shield** and the **European Space Shield**.

They will be open to all Member States who want to participate. Flagships are of a cross-cutting nature and imply progress in several capability areas and in sectors beyond core defence. Protection of critical infrastructure, border management and internal security will be of particular importance.

Member States will decide on these flagships, as well as on possible additional ones (e.g. cyber, maritime...). They will be drivers of these initiatives, agreeing as they see fit on the concrete objectives, task distribution, national budgets funds' allocation, and the most appropriate framework to achieve them.

The Commission will act as a facilitator, providing a “one-stop-shop” service to give technical assistance and advice to Member States on how to link national actions with its available tools and funding opportunities (including regional funds), while ensuring consistency and continuity among the different work strands. The High Representative, through EEAS, EUMS and EDA, will provide advice to Member States and ensure that Flagships support agreed priority capabilities areas, are aligned with long term-capability development objectives and are coherent with NATO military plans.

By Spring 2026 participating Member States should agree on the appropriate coordination arrangement, with support from the Commission, the High Representative and other EU actors, including the European Defence Agency. Progress on each flagship will be monitored in the Annual Defence Readiness Report.

The European Drone Defence Initiative and the Eastern Flank Watch

Recent repeated violations of the airspace of EU Member States have shown the urgency of creating a flexible, agile and state of the art European capability to counter unmanned aerial vehicles. While the Eastern border Member States face the greatest direct threat from Russia and Belarus, such a threat can reach any Member State, as shown by recent incidents.

The European Drone Defence Initiative will be designed with a 360° approach, as a multi-layered, technologically advanced system with interoperable counter-drone capabilities for detection, tracking, and neutralisation, as well as capabilities to hit ground targets by leveraging drone technology for precision strikes. The counter drone capacity should be fully interoperable and connected among Member States providing European situational awareness and ability to act together and secure critical infrastructure together with NATO.

These European anti-drone capabilities should build on the lessons learned from Ukraine about the key value of creating innovative drone and counter-drone ecosystems, linking R&D with production, and relying on scalable production capacity and continuous technological development. This is Europe's opportunity to learn the Ukrainian way to conduct military tech innovation, and it will be linked to the proposed Drone Alliance with Ukraine. The counter-drone network will be adaptable for civ-mil and dual use purposes and help deal with non-defence related threats or other hazards common to every EU border. This includes border protection, weaponisation of migration, protection of critical infrastructure and transnational organised crime.

Anti-drone capabilities will form a core component of the Eastern Flank Watch flagship, which aims to build-up the capacity of Member States on the Eastern border to face a wide range of threats, including also hybrid operations, Russia's shadow fleet and the risk of armed aggression. It aims to fortify the EU's Eastern borders across land, air and sea, contributing to the security of the whole Union.

The Eastern Flank Watch will integrate the air defence and counter-drone systems with a set of ground defence systems with maritime security in the Baltic and Black Seas and systems for increased situational awareness, as well as internal security and border management. The Eastern Flank Watch should be fully aligned with the EU's Black Sea Maritime Security Hub and NATO's integrated command and control structure, and complementary to Operation Eastern Sentry, Baltic Air Policing, and the Forward Presence forces. It will help develop with maximum urgency elements which will be expanded and integrated in a broader project at European scale.

Objectives:

It is proposed to aim to establish a comprehensive European border defence capability with multi-domain surveillance systems, drone and counter-drone capabilities, electronic warfare capabilities, precision strike systems, and responsive operational coordination. All in close cooperation with NATO and complementary with its regional plans for territorial defence. An Eastern Flank Watch should be developed in all the Member States along the EU's Eastern border, including taking into account the land and sea border with Russia and Belarus, to contribute to ramp up European defence.

Milestones:

1. EUCO to endorse the European Drone Defence Initiative and the Eastern Flank Watch as priority flagships - by end 2025
2. European Drone Defence Initiative and Eastern Flank Watch launched – Q1 2026
3. First EDIP calls for production scaling and support to common procurement. First pre-financing payments in the SAFE framework for the projects part of the Flagships – Q1 2026
4. European Drone Defence Initiative and Eastern Flank Watch initial capacity – by end 2026
5. European Drone Defence Initiative fully functional – by end 2027
6. Eastern Flank Watch functional – by end 2028

While the Eastern Flank Watch and the European Drone Defence are the most urgent, work should accelerate to develop a **European Air Shield** to achieve an integrated, multi-layered air and missile defence protection for Member States, fully interoperable with NATO's Command and Control system, as well as on a **European Space Shield** to ensure the protection and resilience of space assets and services.

European Air Shield

The integrated **European Air Shield** Flagship will protect Member States' airspace and state functions. EU programmes will support Member States to achieve an integrated, multi-layered air and missile defence shield, including necessary sensors, that protects against the full spectrum of air threats and is fully interoperable with NATO's Command and Control system. It will help Member States' Armed Forces reduce dependencies and support Allies in achieving their NATO targets.

Objective:

It is proposed to create a European Air Shield to cover the entire Air and Missile Defence spectrum that is fully interoperable with NATO Command and control system and doctrine.

Milestones:

1. EUCO to endorse the European Air Shield as a priority flagship – by end 2025
2. European Air Shield launched - Q2 2026
3. EDF and EDIP work programmes to prioritise Air and Missile Defence related actions – by end 2026

European Space Shield

The **European Space Shield is key to** enhance Member States' defence capabilities and ensure the **protection and resilience of space assets and services** against growing threats and to achieve defence readiness 2030 building on national and commercial space assets, with the support of the EU space systems. It will complement the EU dual use Space capabilities that will provide governmental services for the benefit of all Member States in: Positioning, Navigation and Timing with the Galileo Public Regulated Service, geospatial intelligence with the Earth Observation Governmental Service and secure communications with IRIS² in incentivising Member States to develop together sovereign capabilities. It will foster the development of interoperable national defence capabilities, focusing notably on Galileo enabled equipment, Space Domain Awareness, countering jamming and spoofing, and in-space operations and services, where Europe has clear shortfalls and dependencies.

Objective:

It is proposed to set up and protect a comprehensive European system of space capabilities that serve defence purposes, building on the EU space systems and existing national capacities.

Milestones:

1. EUCO to endorse the European Space Shield as a priority flagship – by end 2025.
2. Prioritise related actions in Space, IRIS², EDF and EDIP work programmes in a coordinated approach and work with Member States to support coordination of their procurement plans (SAFE) – as of 2026
3. Launch the European Space Shield – Q2 2026

5 – The defence industrial dimension

A strong, resilient and technologically innovative industrial base, with its roots in the EU, is a key component of Europe's deterrence and both its physical and economic security. It is also an engine for growth, given the size of the EU market, employment potential and the spill-over effects on the wider economy. The drive to close capability gaps must be an opportunity for EU defence industry to increase its competitiveness, cooperate further and embrace innovation, positioning itself at the technological frontier and boosting export

potential. This must benefit all companies in the supply chain, notably start-ups, scale-ups, SMEs and Mid-Caps, and must also benefit regional economies and smaller Member States.

Four years of war in Ukraine have shown how critical it is to have sufficient stocks of ammunitions and equipment, to have production lines that can expand quickly and resupply, and to have well-synchronised supply chains. Public and private investment must foster scale up of industrial ecosystems in the next five years, with benefits for regional economies.

In this context, the Commission stands ready to provide industry with competition guidance on cooperation projects in the defence sector. The Commission is also engaging with Member States to assess whether it should modernise its approach under State aid rules in the sector and possibly provide guidance.

To better connect progress on closing capability gaps with the ramp up of the European Defence Technological and Industrial Base (EDTIB), the Commission will **deepen its understanding of the current and planned European industrial production capacity**, focusing each year on selected priorities. This will start with air and missile defence, drones/counter-drone systems and space systems.

Member States should leverage their joint buying power through **multiannual procurement programmes** to send the right long-term signals to help business take investment decisions on expanding production and deliver what is required to close the capability gaps. A greater coordination of these programmes would reduce fragmentation, strengthen much needed interoperability, and ensure value for money.

Innovation is a critical component of Europe's defence readiness. Disruptive technologies, their fast testing and embedding in defence capabilities and agile engagement with the tech community are essentials for modern warfare. EU funding will therefore be directed to stimulate R&D investment and innovative industrial productions, catalysing additional private investment and promoting dual use start-ups, scale-ups and innovative SMEs and Mid-Caps. Simplified procurement procedures for start-ups and SMEs could also be considered. The recent mid-term review of cohesion policy provides incentives to re-programme cohesion funding towards the development and manufacturing of critical technologies and enhancing defence capabilities. The future **EU Competitiveness Fund** will focus on novel technologies and disruptive solutions from new tech actors, including scale-ups, SMEs and Mid-Caps. The future **Horizon Europe Framework Programme** and notably its European Innovation Council, will support deep tech and disruptive innovation from research to scale-up, including on defence applications. The **European Defence Transformation Roadmap** will provide a framework for this and will be presented by the end of November. It will propose new ways to boost innovation with the defence industry, including scale-ups and SMEs, driven by the need for greater agility, speed and risk-taking.

Europe must ensure it stays ahead of the defence tech curve, notably on the use of Artificial Intelligence. We must **strengthen investment and innovation in Europe's defence-tech-industrial base**, in particular regarding the production of critical systems for modern warfare – whether drones, satellites, command and control or a secured European cloud – where AI will be a determining factor for our ability to produce the capabilities needed.

To support these efforts, the European Commission will therefore **accelerate simplification** to ensure access to relevant datasets for training and validating robust, human-centric and trustworthy AI solutions, and cut administrative burden, including through possible new simplification measures.

A new partnership of EU, national governments and stakeholders in the defence sector must underpin collective readiness efforts. Building on the dialogue between the Commission and the European defence industry, an annual **Summit of Defence industry** should involve governments, EU actors, primes, SMEs, mid-caps and tech innovators.

The European defence industry needs skilled workers. Within the **Pact for Skills**, the **Large-scale Skills Partnership in Aerospace and Defence** is working on skills forecasting, upskilling and reskilling programmes, and talent engagement, to support Member States to reskill 600,000 people for the defence industry by 2030. The EU Skills Guarantee can also help transit workers from sectors at risk to strategic sectors, such as the defence industry.

Defence manufacturing also depends on secure access to critical raw materials. Strategic dependencies and bottlenecks in critical raw materials and components must be tackled. The Observatory of Critical Technologies will produce a risk analysis which will form the basis for clear targeted measures to address weaknesses. These could include giving industry the possibility to obtain support for projects that secure supply, for instance through research into alternatives or through stockpiling, or other projects under the Critical Raw Materials Act.

Promoting partnerships on security and defence with like-minded countries is essential for our capability development, interoperability, innovation and defence industrial readiness as well as to diversify supplies of raw material or critical components. In line with the White Paper, the EU has taken concrete steps to advance its partnership agenda in the field of security and defence with allies and like-minded partners, notably NATO, with which the EDA will pursue a technical arrangement for the exchange of classified information. This model is pioneered with **United Kingdom** and **Canada**, with which bilateral agreements are being negotiated to allow their respective defence industries and products to benefit from joint procurement under the SAFE instrument. Defence industrial cooperation is also at the centre of Defence Industrial Dialogues with Japan and, potentially in the future, with India. The EU should also deepen its security and defence partnership with Moldova.

Objectives:

It is proposed to ensure that by 2030 the EDTIB can deliver the capabilities that Member States need at the necessary scale and speed. Production lines should be substantially increased and delivery times for critical defence materiel should be significantly reduced. The full potential of innovation for defence, including Ukrainian solutions, should be tapped. The resilience of defence supply chains should be secured, including by reducing critical dependencies in raw materials and other critical inputs.

Milestones:

1. Co-legislators adopt the European Defence Industry Programme. Commission presents the European Defence Transformation Roadmap – November 2025

2. Commission establishes Tech Alliances for Defence connecting tech innovators with defence users in Member States to help them address critical capability gaps - by end of 2025
3. Commission, in close cooperation with lead nations of the capability coalitions, expands the strategic dialogue with industry in first half of 2026 and hosts the first annual Defence Industrial Summit by mid-2026
4. Commission to present an overview of the industrial capacity ramp up needed to ensure reliable supply for the agreed capability areas – starting by mid-2026
5. Analysis of risks coming from strategic dependencies and bottlenecks in critical raw materials and an Action Plan with mitigating measures for the European defence industry’s international supply chains – second half of 2026
6. Reskilling of 200,000 employees for the defence industry by 2026
7. Competitiveness Fund, defence window, and Horizon Europe Framework Programme are adopted as part of the next MFF and ready to operate – by end 2027

Indicators:

It is proposed to use as indicators in the Annual Defence Readiness Report the following: EU27 defence industry contribution to EU GDP percentage; share of workers in EU27 defence industry, including new jobs created annually; share of new or expanded defence production facilities, the implementation of EU programmes support to innovation in defence, the number of defence related patents registered in the EU, the number of start-ups created and the number of unicorns in the defence sector.

6 – Ukraine as a key part of Europe’s readiness effort

Making Ukraine a ‘steel porcupine’ – indigestible to any invaders – is as important for Ukraine’s security as it is for Europe’s. Europe’s defence readiness efforts should further strengthen Ukraine and ensure Europe benefits from Ukraine’s battlefield experience, innovative ingenuity, effective civ-mil cooperation and ramped-up industrial capacity.

Member States and the EU will contribute to **a framework of long-term security guarantees to Ukraine** that rests on: enduring legal arrangements; predictable multi-year finance and military supplies; defence industrial integration into the EDTIB; clear consultative mechanisms; and a link to Ukraine’s EU accession and postwar reconstruction.

At the heart of this lies a **sustained effort to harness Ukraine’s Qualitative Military Edge (QME)**. To ensure Ukraine’s QME over the medium term, the Commission is working on a **reparation loan**, funded with the cash balances associated with the immobilised Russian assets. This would create the predictable multi-year finance for Ukraine and ensure that Ukraine has immediate access to a steady flow of superior military equipment, predominantly from the European and Ukrainian defence industry, in line with its battlefield requirements, fuelling **industrial partnerships with European companies to innovate and scale-up**. Increased and better training, thanks to the EUMAM mission, and improved intelligence gathering will also be essential parts of Ukraine’s QME.

The Commission’s announcement of a **Drone Alliance with Ukraine**, which could be financially supported by different funding mechanisms including with the help of the frontloaded EUR 2billion from the ERA loans, shows that this can work in practice. The Drone Alliance will support the creation of joint ventures between Ukrainian and European companies outside Ukraine, exploiting European technology together with Ukraine’s

knowledge and experience. Ukraine will also be a full part of the implementation of EU financial instruments, such as **SAFE and EDIP/Ukraine Support Instrument (USI)**, so that equipment is procured for Ukraine, with Ukraine and from Ukraine's industry as much as possible. Depending on progress, **a possible complementary Ukraine-focused initiative could be considered in early 2026** to incentivise further collaborative efforts.

Objectives:

It is proposed to aim to ensure that Ukraine can defend itself and deter any future Russian aggression. The Ukrainian defence industry should be fully integrated with Europe's to provide scale for Ukraine's production and tap the full potential of Ukrainian innovation successes for European defence.

Milestones:

1. Adoption of the Ukraine Support Instrument within EDIP and the "Reparation loan" with an annual allowance for Ukraine to support its QME – by end 2025
2. Deliver on the High Representative's 2 million artillery ammunition initiative – by end 2025
3. Inclusion of Ukraine in the relevant capability coalitions and launch of the EU-Ukraine Drone alliance – by Q1 2026
4. In light of the level of SAFE contributions to Ukraine's defence, assess possible additional incentives to Member States support to Ukraine – by Q1 2026.
5. Proposals for additional measures to incentivise Member States rapid military support to Ukraine – by Q1 2026.
6. Roll-out of 'Brave Tech EU' including funding of the testing of new technological solutions to meet battlefield challenges identified together with UA – by end 2026
7. Continuation of EUMAM, and support to the Coalition of the Willing when conditions allow.

Indicators:

It is proposed to track progress, in the Annual Defence Readiness Reports by monitoring the volume of overall EU military support (EUR) to Ukraine, the total soldiers trained by EUMAM, the volume of large calibre ammunitions delivered and the share of SAFE loans involving Ukraine. Total direct EU27 investment in UADTIB (EUR) and the number of EU – UA Joint Ventures in defence will also be covered to monitor the integration of the Ukrainian defence industry into the EU defence industry.

7 – Horizontal enablers

Towards a true EU-wide market for defence equipment

A well-functioning and simplified EU **defence equipment market is a key condition** for achieving large scale production, create economies of scale and defence innovation. It requires efficient, uniform and fair defence procurement rules, a reliable intra-EU transfer system, a robust Security of Supply regime, and widespread adoption of recognised standards and mutual recognition of certification.

The review of the Defence and Security Procurement Directive should provide Member States with agile procurement procedures adapted to their procuring needs, in particular

when carrying out joint procurement. Increased transparency and openness should allow the EU defence industry to deliver innovative products and services at competitive prices, while predictability should help them develop additional production capacity. The creation of an internal market for defence will require enhanced trust in intra-EU cross-border supply chains. The **Defence Readiness Omnibus** contains proposals to address these issues. Co-legislators should adopt it no later than end 2025. Similarly, the Defence ‘**Mini-omnibus**’ should be adopted no later than December 2025 to better incentivise defence industry-related investment ahead of the next Multiannual Financial Framework (MFF).

Objective:

It is proposed to aim to create by 2030, a genuine EU-wide Market for Defence equipment, with simplified and harmonised rules.

Milestones:

1. Finalise adoption of Defence Readiness Omnibus and the “mini” Omnibus – by end 2025
2. Finalise additional legislative action for the Single Market, notably evaluation of Public Procurement and intra-EU Transfers Directives – by end 2026

Towards an EU-wide military mobility area

Military mobility is a crucial enabler to ensure European security and defence, including for EU support to Ukraine. It is still too difficult to move troops and military equipment across Europe, as shown by exercises with Member States. In 2024, only half of the Member States were fully compliant with the 5 working days commitment. The EU has identified over 500 “hotspot” projects with investment needs of around EUR 100 billion. These should be addressed as a priority to remove key gaps and bottlenecks along the four priority military mobility corridors. The Eastern Flank is particularly exposed by the absence of continuous and interoperable trans-European transport networks. To spearhead progress, an ambitious **Military Mobility package** will be presented in November, including proposals to set up a unified regulatory framework to facilitate the transport of equipment, goods and passengers for military or civil protection purposes across Europe, and targeted amendments to existing EU legislation to better accommodate military mobility requirements for dual-use infrastructure.

Objectives:

It is proposed to set up by end 2027 an EU-wide military mobility area, with harmonised rules and procedures and a network of land corridors, airports, seaports, and support elements ensuring unhindered transport of troops and military equipment across the Union, in close coordination with NATO, and boosting the availability of civ-mil transport capabilities.

Milestones:

1. Presentation of the Military Mobility package – before end 2025
2. Identify and prioritise concrete military mobility hotspot projects along the Military Mobility Corridors – by Q1 2026
3. Co-legislators adopt the Military Mobility Package – by end 2026

4. New Military mobility window within the Connecting Europe Facility adopted and operational – by end 2027

Indicators:

It is proposed that the Annual Defence Readiness Report will report on commitments taken by Member States to ensure that issuing movement permissions for troop and equipment is as swift as possible (3 to 5 working days); number of hotspot projects supported with EU funding; CEF Military Mobility budget percentage disbursed; and number of Military Mobility projects supported by EIB Group.

Ensuring adequate financial resources and investment

Under the current MFF, EU instruments supporting the defence industry have shown their added value. The **European Defence Fund (EDF)** is now the third defence R&D investor in the EU and, with limited amounts, **ASAP** and **EDIRPA** contribute to reducing critical shortfalls and have leveraged additional investment from industry and Member States of more than EUR 12 billion. Once in force, **EDIP** will offer new specific tools for delivering additional capabilities, including flagship projects, such as the European Defence Projects of Common Interest (EDPCIs) or the Structures for European Armament Projects (SEAP).

The activation of the **National escape clause (NEC)** gave additional fiscal space to 16 Member States so far to further increase their defence spending. The **Security Action for Europe (SAFE)** instrument has been fully subscribed by 19 Member States, exhausting the envelope of EUR 150 billion. In addition, following the mid-term review of the Cohesion Policy instruments, Member States and regions can reallocate cohesion funds to defence-related investments including military mobility, benefiting from higher flexibility and pre and co-financing rates and EU regions adjacent to Ukraine will also receive targeted support as those bordering Russia and Belarus.

In the next MFF, the Commission has proposed to **increase substantially the budget for defence and space**. Within the European Competitiveness Fund, defence and space would benefit from a window of EUR 131 billion to support Member States' long-term efforts to achieve defence readiness. Within the Horizon Europe Framework Programme dual-use actions would be eligible for support from the EUR 175 billion budget, and the European Innovation Council would be able to support innovation in critical technologies with focus on defence applications. In addition, the **Military Mobility** budget would increase from EUR 1.76 billion (already frontloaded and fully allocated by early 2024) to EUR 17.65 billion.

Private capital flows to defence are equally important. Progress towards a **Savings and Investments Union** in Europe will help channel long-term private capital into defence investment, innovation and infrastructure. The **EIB Group** has recently stepped up substantially its financing of projects related to defence, including infrastructure, to further support European defence industry and contribute to finance EU's defence capability and technological priorities. This will send a strong signal to markets.

Objectives:

It is proposed to incentivise a surge in private and public investment in defence and to achieve maximum efficiency and impact for EU funded support.

Milestones:

1. Together with EIB/EIF, create an up to EUR 1 billion Fund of funds (equity) supporting the fast growth of defence-related scale-ups and defence related projects – by Q1 2026
2. New MFF instruments are approved and operational by end 2027
3. SAFE is at least 50% disbursed by Q3 2028

Indicators:

The annual defence readiness report could include specific indicators on the public-private investment ratio in defence and on the annual evolution of EIB Group support to security and defence.

8 – The way forward: the road to 2030

Europe needs urgent action to address an escalating threat. Member States have changed gear. Investment in defence has surged. The SAFE regulation was approved in record time and the whole EUR 150 billion envelope is fully subscribed. The omnibus on defence readiness was presented. The wheels are in motion. When Europe works with a sense of urgency, results are delivered.

Building a credible EU defence readiness in five years is, by any standards, an ambitious endeavour. But if we achieve clarity on goals, match our objectives with the necessary resources, act in a coordinated way and work against precise timelines, it can be achieved.

Europe's most successful projects, the Single Market or the euro, have been realised with this method, based on a multi-year programme in different phases and a constant political steer to drive the process forward. The same logic must drive the leap in Europe's defence policy.

This Roadmap sets out clear objectives for 2030, identifies areas where swift and sustained action is needed and sets tangible collective milestones.

To keep momentum, the **European Council** needs to provide regular political steer, tracking progress on an annual basis and recommending priority actions.

Europe needs to agree on projects, investment and contracts already now, for its readiness by 2030.

The European Commission and the High Representative invite the **European Council** to endorse the main proposals contained in this Roadmap and to provide the political orientation to progress towards readiness by 2030 through the proposed milestones.