EUROPEAN DEFENCE AGENCY

ANNUAL REPORT 2025

FOREWORD

By André Denk
Chief Executive

Russia's war of aggression against Ukraine continues to cast a long shadow across our continent. It is not only a brutal assault on a sovereign nation; it is a direct challenge to our security. Large-scale, high-intensity warfare demands that the European Union and its Member States strengthen their defence capabilities, sustain readiness for major operations and be able to respond to crises in our neighbourhood.

At the same time, transatlantic defence is evolving. Expectations of greater burden-sharing are sharpening, and the EU must step up, in coherence with NATO. As EU Heads of State and Government have made clear, strategic autonomy can no longer be an aspiration; it is a long-term necessity.

Against this backdrop, EU leaders have called on Member States to decisively ramp up their defence readiness by 2030, close critical gaps, strengthen resilience and ensure that European militaries can act with speed, scale and credibility.

With this context, the European Defence Agency fulfils its mission under Article 42(3)[1] of The Treaty on European Union. Our purpose is to support our shareholders, the Member States, in developing defence capabilities, advancing research and technology, promoting cooperation in armaments and acquisition, and strengthening Europe's industrial and technological base. We identify operational requirements at EU-level, promote measures to meet them and assist in evaluating progress in military capability development.

In 2025, the Agency intensified its role as the intergovernmental nexus for defence cooperation at EU-level. Acting in line with our mandate, which was reinforced in 2024, we supported Member States across five essential functions, our core tasks:

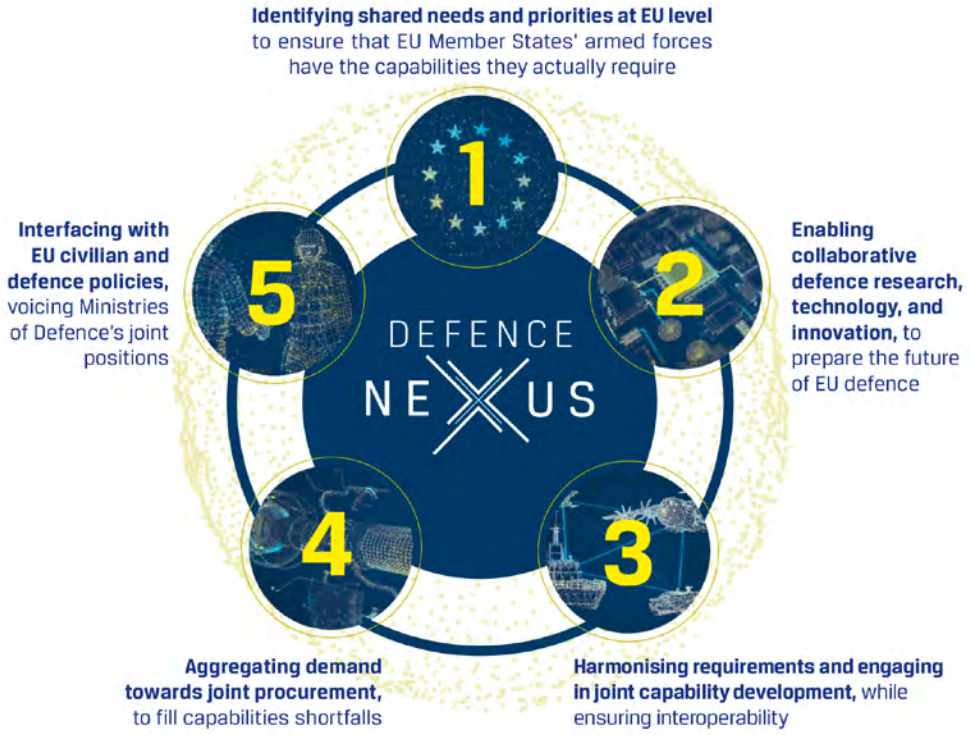
1. Identifying shared priorities;
2. Enabling collaborative research, technology and innovation;
3. Harmonising requirements and developing capabilities jointly;
4. Aggregating demand for collaborative procurement;
5. Ensuring that Ministries of Defence speak with a coherent voice across EU civilian and defence policies.

This annual report is guided by those five core tasks.

Innovation has been a central pillar of this effort. Through the Hub for EU Defence Innovation (HEDI), we launched the first EU-wide operational experimentation campaign for autonomous systems at EU-level and convened the third European Defence Innovation Days. In parallel, we strengthened our position as the preferred EU platform for collaborative defence research.

Delivering full-spectrum, next-generation capabilities across all operational domains remains at the heart of our work. In 2025, we intensified support to Member States across immediate, medium- and long-term horizons. A flagship achievement was our establishment of an online government-to-government matchmaking platform to accelerate collaboration. Within five months, 340 users from 26 Member States and seven partner countries published more than 400 projects and over 50 capability needs. At the request of Member States, this platform will become a permanent service in 2026.

1. Member States shall undertake progressively to improve their military capabilities. The Agency in the field of defence capabilities development, research, acquisition and armaments (hereinafter referred to as 'the European Defence Agency') shall identify operational requirements, shall promote measures to satisfy those requirements, shall contribute to identifying and, where appropriate, implementing any measure needed to strengthen the industrial and technological base of the defence sector, shall participate in defining a European capabilities and armaments policy, and shall assist the Council in evaluating the improvement of military capabilities.



EDA also helped Member States agree on potential joint projects through the Coordinated Annual Review on Defence (CARD). Particular progress was achieved on loitering munitions, where a robust business case was completed, paving the way for joint procurement and medium-term development.

Beyond developing the equipment, doctrine and training that the EU needs, the Agency has acted as a trusted facilitator for the EU. We contributed to the White Paper for European Defence Readiness 2030, supported deliberations on the European Defence Industry Programme and the SAFE Regulation, and ensured that defence perspectives were fully reflected in the Defence Readiness Omnibus package.

Our Administrative Arrangements with Norway, Switzerland, Ukraine, the United States, the European Space Agency and OCCAR have further strengthened Europe's cooperative ecosystem, with deepening engagement from Ukraine's Ministry of Defence.

Finally, the European Council has entrusted the Agency, with the support of the Head of Agency/High Representative and European Commission, to prepare the annual defence readiness report and to strengthen our capacity to deliver. We accept this responsibility with determination.

The tasks before us are urgent and complex. The European Defence Agency stands ready, for our shareholders the Member States, and the security of all our citizens.

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André Denk
Chief Executive

CHOOSING WHERE WE FOCUS OUR EFFORTS

Core Task One: Identifying shared capability needs and priorities at EU-level to ensure that EU Member States' armed forces have the capabilities they require.

"The urgency of transforming EU defence is real. Member States want the Agency to do more. So at EDA, we are transforming while operating."

Stefano Cont
Acting Deputy Chief Executive in 2025,
EDA Capability, Armaments, Planning Director

The European Defence Agency (EDA) in 2025 continued to support its Member States in strengthening European defence capabilities through structured cooperation. Building on the 2023 revision of the Capability Development Plan (CDP) — which serves as the baseline for EU-wide defence planning and for initiatives such as Permanent Structured Cooperation (PESCO) and the European Defence Fund (EDF) — the Agency maintained its focus on the collaborative implementation of the 22 EU Capability Development Priorities.

The 22 priorities cover Europe's entire spectrum of military capabilities: the 2023 CDP revision resulted in 14 priorities across the five military domains, and a further eight categorised under strategic enablers and force multipliers[2].

In 2025, the Agency complemented its work strands in its working bodies with a new focus to support the nine Priority Capability Areas (PCAs) listed by the European Council, while EDA supported the objectives of the EU Defence Readiness White Paper 2030. EDA also further refined its ways of working to improve support of Member States' capability efforts.

2. The 2023 EU Capability Development Priorities

"A wave of new initiatives and instruments, both planned and already underway, will undoubtedly accelerate collaborative capability development in the years ahead. Ultimately, all roads must lead to Rome: the EU Capability Development Priorities and the anchor it provides."

Conor Kirwan
Project Officer Capability Development Priorities

INNOVATING MEANS MOVING FORWARD, TOGETHER

Core Task Two: Encouraging collaborative research, technology, and innovation to maintain Europe's technological edge in defence.

At the end of 2025, 82 new R&T projects were under negotiation at EDA, with a total value of €490 million. Combined with the existing portfolio of 52 ad hoc R&T projects, the overall value of ongoing and planned projects now stands at €788 million.

The European Union continues to face structural challenges in scaling up defence innovation at the pace required by an increasingly volatile security environment. Investment in Research and Development (R&D) does not yet match the EU's ambition to secure a long-term technological edge. In the United States, Research, Development, Test and Evaluation (RDT&E) accounts for around 16% of the overall U.S. defence budget, compared to approximately 4% within the EU.

Encouragingly, EU R&D spending is expected to have reached €17 billion in 2025, according to EDA's Defence Data publication for 2024-2025. Meanwhile, the European Defence Fund (EDF) is providing nearly €1 billion in funding for the most recent cycle of projects. Total European collaborative Research and Technology (R&T) spending is projected to increase to more than €600 million by 2026, up from €359 million in 2023, reflecting both growing national contributions and support from EU-level instruments.

EDA is playing a growing role, supporting short-term innovation through the Hub for EU Defence Innovation (HEDI), as well as mid- to long-term R&T through 15 Capability Technology Groups (CapTechs), as detailed in this annual report.

HUB FOR EUROPEAN DEFENCE INNOVATION (HEDI)

HEDI has developed to offer Member States the services they need to identify, mature and test technologies with a view to rapid adoption by armed forces. HEDI has also expanded operational experimentation to move ideas more quickly from the laboratory to the field. In 2025, it deepened cooperation with the European Commission.

HEDI'S HIGHLIGHTS OF 2025

European Defence Innovation Days (EDID25): Held in Krakow from 14–16 May 2025 under the Polish Presidency of the EU, this third edition brought together almost 1,000 participants for discussions, pitches, technology demonstrations and live experiments. The conference included dedicated time for small and medium-sized enterprises (SMEs), featuring an AI pitch battle. EDID25 also introduced practical, hands-on events such as the first Unmanned Ground Vehicle (UGV) Makeathon, which paired military academies with innovators to solve operational problems. The event further featured a high-level Ukrainian delegation, reflecting the growing EU-Ukraine cooperation on defence innovation. These kinds of initiatives shorten the time from identifying needs to delivering solutions.

Operational Experimentation (OPEX): HEDI ran its first full-scale OPEX campaign on cross-domain logistics for autonomous systems, hosted by the Italian Army's at two test facilities: CEPOLISPE and UTTAT, both near Rome. Over the campaign, 108 experts from 22 countries took part, including 20 Member States, as well as Switzerland and Ukraine. The campaign concluded with a validation day in July 2025. The main result was a practical, procurement-ready guide that Member States can use to accelerate acquisition of autonomous logistics systems. This approach reduces risk, ensures interoperability between countries and establishes a methodology for future campaigns.

Proof-of-Concept (PoC) pipeline: Building on 2024's AI-in-wargaming project, HEDI advanced end-user engagement in 2025, testing AI decision-support for integrated air and missile defence. This work informs future experimentation and adoption.

"The work in R&T allows us to translate personal initiative into European action. We mature cutting-edge defence technologies into real military capabilities, giving our forces the advantage they need on the battlefield. This effort is driven by a deeper motivation: to preserve peace, freedom of action and a secure future for our children."

David Neumann
Project Officer Guidance, Navigation and Control

"Technological superiority is increasingly determined by speed: speed of experimentation, speed of learning, and speed of adoption. By connecting innovators with operational users and testing environments, EDA enables Member States to accelerate the cycle."

Federica Valente
Research, Technology and Innovation Coordinator

CAPABILITY TECHNOLOGY GROUPS (CAPTECHS)

EDA's CapTechs bring together national experts, industry including SMEs and startups, academia and research organisations. Their goal is to accelerate the transition of emerging technologies from the lab to real-world military applications, supporting EU defence capability objectives. Each CapTech has an EDA-appointed moderator who oversees daily operations. CapTechs serve as a forum for nations and industry to discuss new EDA-backed R&T projects.

HERE ARE THE HIGHLIGHTS OF 2025:

- **CapTech Aerial Systems (Air)** advanced long-term research in air combat and transport technologies. In 2025, the first phase of the Automatic Air-to-Air Refuelling, Hose & Drogue, project was completed and included two flight tests in Spain and Germany. The second phase, focused on fully autonomous air-to-air refuelling, was approved by the EDA Steering Board. Separately, a project on health monitoring systems for fully electric drones was also launched.

- **CapTech Ground Systems (Land)** facilitates the development of future land capabilities. Aligned with the Capability Development Plan (CDP), CapTech Land continued supporting Member States in developing future land systems and enhancing legacy capabilities. In 2025, five new projects were launched. Preparations are underway for 13 further projects covering a broad range of land-related technologies.

- **CapTech Naval Systems (Maritime)** develops and improves naval technologies for European navies, including manned and unmanned platforms as well as the integration of different weapons, energy and other systems, as well as sensors. In 2025, CapTech Maritime implemented projects in the areas of: Swarm of Autonomous Underwater Vehicles, Modular Lightweight Minesweeping Next Generation, Evaluation of Thin Line Array Technologies, and Submarine Hull/Rudder/ Propeller Hydroacoustic and Hydrodynamics.

- **CapTech Missiles and Munitions** had a portfolio of six projects in 2025, including the ERICA project, which focuses on enhancing the lethality of future warheads through research on reactive materials. A study on AI applications in missile and munitions technologies is also underway.

- **CapTech Electro Optical Sensors Technologies (Optronics)** develops R&T activities on electro-optical passive and active sensors and image processing and enhancement, specifically to improve ISTAR. In 2025, the Q-Lamps project concluded, delivering new quantum and photonic sensors. Two projects continued on hyperspectral

imaging and developing a European computer model for optronic systems performance prediction. Another two projects are planned for 2026 on camouflage detection and quantum sensors. Several studies on advanced optics were started.

- **CapTech Communication Information Systems and Networks (Info)** progressed in developing resilient military communication systems. This CapTech fosters innovation in military communication systems and information networks. In 2025, three projects were ongoing, with more planned for 2026. A study on 6G technology for defence was concluded in 2025, and a new study on Generative AI for Defence will be launched.

- **CapTech Cyber Research & Technology (Cyber)** continues long-term research on cyber resilience. Two projects are ongoing: Cyber Electromagnetic Resilience Evaluation on Replicated Environment, and Protection of Autonomous Systems against Enemy Interference. More projects were signed in 2025. A four-year framework contract on Data-Centric Security and Zero Trust Architectures (DARC) is also in progress.

- **CapTech Energy & Environment** focuses on energy resilience, sustainable operations, and climate-related challenges. The €1.2 million E+ZERO project launched in 2025, aiming to develop rapidly deployable, energy-efficient, zero-emission military buildings for smart, independent operations.

- **CapTech Space** continues to support research, innovation, and technology for defence space capabilities. In 2025, three projects were ongoing, with a combined budget of €19 million, including: the Autonomous Space-Based Situational Awareness (ASSAI), operating a small satellite constellation with in-orbit demonstrations; and Low Earth Orbit (LEO) to Very Low Earth Orbit (VLEO) (LEO2VLEO), the first EDA satellite project set to reach orbit in 2027.

- **CapTech Guidance, Navigation & Control (GNC)** launched two projects in 2025, a low-power, passive autonomous navigation project for beyond line-of-sight missions, and another for navigation by synthetic aperture radar. The first phase of two projects, the Autonomous, Reconfigurable Swarms of Unmanned Vehicles, and the Resilient Position, Navigation, and Timing Testing for Defence, were completed. Three new projects on autonomous systems and quantum navigation, with a combined value of €21 million, are set to begin in 2026.

- **CapTech Technologies, Components and Modules** works on technologies that constitute essential building blocks for many defence applications, as well as ensuring technology availability, access and continued development for the European defence community. Furthermore, electronics components are often associated with potential critical dependencies.

- **CapTech Radio Frequency (RF) Sensors Technologies (Radar)** seeks to improve Intelligence, Surveillance, Target Acquisition, and Reconnaissance (ISTAR) capabilities. Two projects are ongoing, examining the biological effects of radiofrequency electromagnetic fields. Three additional projects are expected in 2025–2026, focusing on benchmarking, simulation, measurement, radar cross-section evaluation, advanced radar processing, and electronic beam scanning demonstrations, using metasurfaces — engineered surfaces that manipulate light through spatially arranged nanoscale features, or "meta-atoms".

- **CapTech Materials and Structures** develops technologies for capabilities requiring advanced lightweight materials. The second phase of the CERAMBALL project on lightweight ceramics for ballistic protection concluded in 2025, while the third phase is in preparation. Two other projects on advanced sustainable materials for ballistic protection finished in 2025, and the €63 million, long-term ICARO programme signed by 16 Member States, continued.

- **CapTech CBRN and Human Factors** supports the strengthening of European armed forces' capability to safely operate in an environment contaminated by chemical, biological, radiological and nuclear (CBRN) materials and agents. The CapTech also contributes to crisis response operations that are civilian-led, if needed.

- **CapTech Simulation Technologies strengthened its role in digitalisation across all domains (air, land, sea, space, and cyber).** A new AI-based stealth drone prototyping project was launched, and preparations for UAV operations in icy conditions and urban aerial warfare projects continue. Two studies progressed significantly: one on digital twins for defence applications, and one on AI-based forecasting for terrestrial and space weather. Technology building blocks were updated to include swarm operations and quantum-based simulation.

AUTONOMOUS SYSTEMS COMMUNITY OF INTEREST (ASCI)

EDA brought together the Autonomous Systems Community of Interest (ASCI) in November 2025 for the second year running. This time in Tallinn, the forum gathered Member States, NATO, Ukraine and industry to discuss ways to move faster from research to deployment.

Discussions focused on how shared experimentation and joint testing can help Member States and companies validate emerging concepts and integrate them into military structures. Emphasis was placed on the role of trustworthy AI — in line with EDA's Action Plan on Artificial Intelligence — including the need for secure, high-quality datasets, standardised training methods and robust testing frameworks.

"The Autonomous Systems Community of Interest was established in 2024 and, in just two years, has grown to over 1,200 members from all EU Member States, becoming one of the EU's largest communities on autonomous systems. It promotes knowledge exchange and accelerates development to maximise integrated EU efforts in this field."

Mario Martinho
Project Officer Land Systems Technologies

EU-FUNDED DEFENCE RESEARCH

The European Defence Fund (EDF), which co-finances multinational defence projects using money from the EU's long-term budget, is the Union's instrument to support collaborative defence research and capability development, strengthening Europe's security, technological base and strategic autonomy.
The Commission has entrusted EDA with 42 EDF projects, including those from the most recent 2024 Calls for Proposals, with a total value of over €300 million. Notably, aside from the EU Defence Innovation Scheme (EUDIS)-related project focused on cross-border defence innovation in materials and components, these medium-scale R&D projects are part of three calls dedicated to defence innovation. They are led by non-traditional actors, such as SMEs, mid-caps, and research organisations.

The decision to entrust innovation-focused projects reflects a strategic intent to reinforce cooperation between EUDIS and HEDI, while facilitating a more coherent pathway from research to capability development through EDA.

In June 2025, EDA and the Commission's DG DEFIS formalised their longstanding partnership by signing the Financial Framework Partnership Agreement (FFPA). This agreement not only sets out the general terms for ongoing cooperation in the indirect management of EDF projects but also streamlines the negotiation process for annual Contribution Agreements. As a result, EDA benefits from increased predictability and stability regarding its entrusted project portfolio and related resources. EDA will take on additional projects from the upcoming calls.

"As a trusted partner of the European Commission, EDA plays a pivotal role in advancing innovation-driven EDF projects. EDA mobilises people across Europe and reinforcing the strategic interface between defence innovation and capability development."

Cristina Di Prima
Project Officer EU-funded Defence Actions

FROM IDEAS TO ACTION

Core Task Three: Harmonising military requirements and engaging in joint capability development, while ensuring that equipment and assets can be interoperable between Member States.

In 2025, EDA supported 35 capability development projects with a total value of €260 million.

IMPLEMENTATION OF THE EU CAPABILITY DEVELOPMENT PRIORITIES

In 2025, implementation came through two complementary strands. Firstly, the Coordinated Annual Review on Defence (CARD), identifying areas of cooperation for Member States, and secondly, the Priority Implementation Roadmaps (PIRs), ensuring structured and coherent follow-up.

In parallel, the Overarching Strategic Research Agenda (OSRA) was updated to match collaborative Research, Technology and Innovation (RTI) with Member States' long-term operational needs. The update incorporated links with EDA's Hub for European Defence Innovation (HEDI), reinforcing the link between emerging technologies and the mix of equipment, technology, training and doctrine needed for capability development in defence.

Capability development extends beyond equipment, technology and systems. It also includes the training and education of personnel, operational procedures, logistics, maintenance, and infrastructure. Agreed needs form the basis of a business case, outlining options for ways forward together. As a starting point, the Agency informs discussions with papers that define the military problems at hand and describe challenges and gaps, before solutions are identified.

In 2025, EDA proposed to Member States a range of potential activities, spanning short- to long-term initiatives. These proposals contribute to supporting the PCAs and support the objectives of the EU Defence Readiness White Paper 2030, while also laying the groundwork for potential European capability and armament cooperation programmes.

CARD: LAUNCH OF THE FOURTH CYCLE

The year 2025 marked the launch of the fourth CARD cycle. The Agency — with the involvement of the EU Military Staff (EUMS) and in coordination with the European External Action Service (EEAS) and Member States — adjusted its methodology. The objective is to better facilitate European cooperation programmes capable of benefiting from EU instruments and contributing directly to Defence Readiness 2030. The next CARD report is expected to be finalised by November 2026.

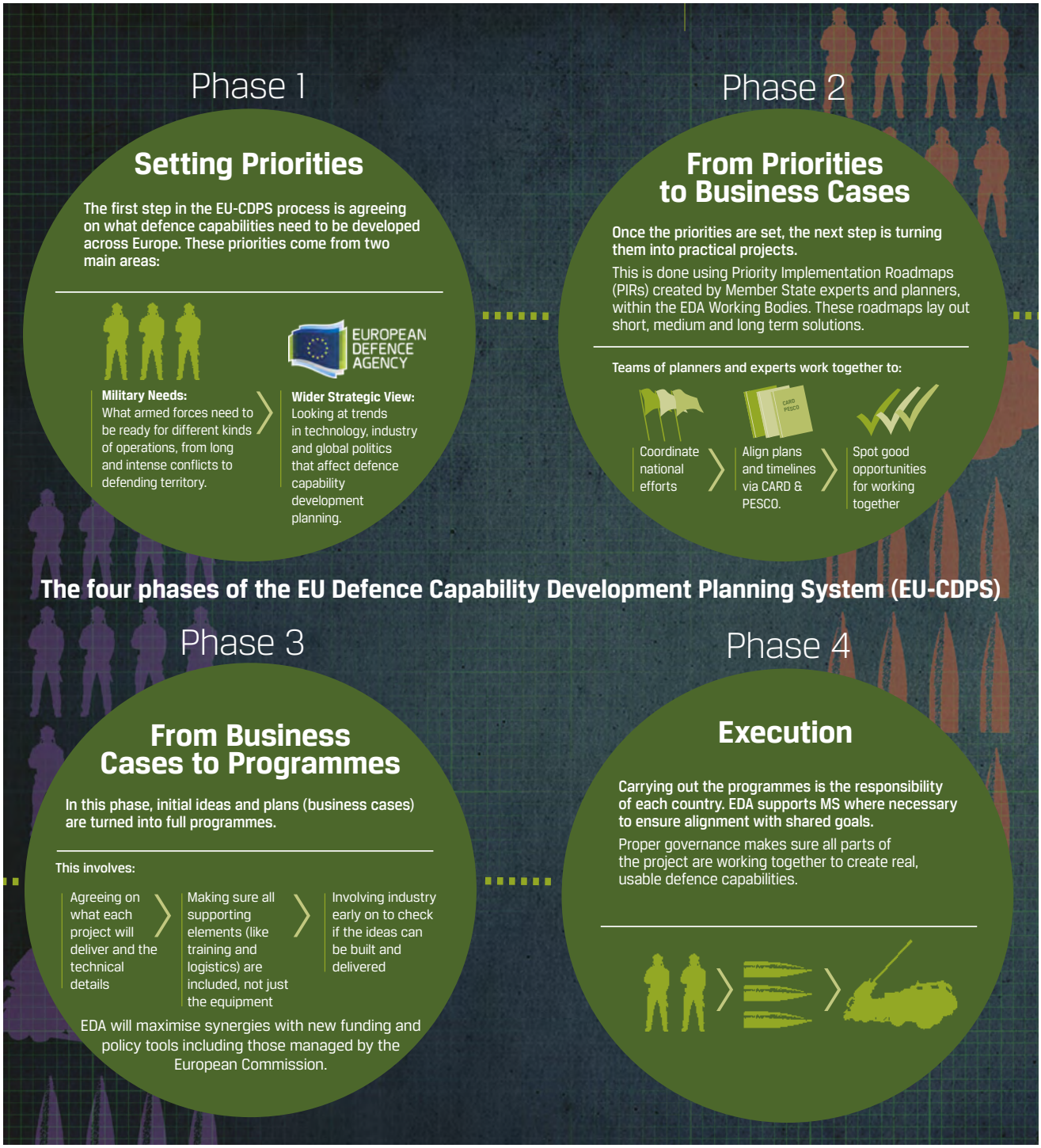
PRIORITY IMPLEMENTATION ROADMAPS (PIRS)

The new governance framework for capability development, established in 2024, became fully operational in 2025. Capability Planners Groups and 18 Capability Expert Groups developed into working communities, assuming responsibility for their roadmaps.

These groups are now focused on defining capability objectives and advancing activities and projects. In addition to the 16 PIRs endorsed in 2024, the expert group on chemical, biological, radiological and nuclear (CBRN) defence developed the roadmap dedicated to this critical domain in 2025.

"The Coordinated Annual Review on Defence enables cooperative capability development through the early identification of opportunities and the convergence of efforts. Its open and transparent dialogues help foster a shared understanding of national capability priorities and challenges, building on EDA's defence data."

Marlène Meunier
Project Officer Cooperation Planning and Strategic Analysis



PESCO: SUPPORTING PROJECT MANAGEMENT

EDA supports Member States in agreeing their needs and taking forward collaborative projects. They can choose to manage capability development through the Agency's framework. In 2025, EDA supported capability development activities, including 10 within **Permanent Structured Cooperation (PESCO),** where Member States determined that EDA support would improve coordination and project management:

1. **CBRN Surveillance as a Service** (CBRN SaaS): Enhancing the EU's ability to detect and respond to chemical, biological, radiological, and nuclear threats.

2. **Deployable Modular Underwater Intervention Capability Package** (DIVEPACK): Developing a mobile system for underwater operations.

3. **Cyber and Information Domain Coordination Centre** (CIDCC): Strengthening coordination in cyber operations.

4. **Next Generation Small RPAS** (NGSR): Advancing the EU's small remotely piloted aircraft systems.

5. **Essential Elements of European Escort** (4E): Improving naval escort capabilities.

6. **Anti-Torpedo Torpedo** (ATT): Creating a defence system to intercept and destroy incoming torpedoes.

7. **Geo-meteorological and Oceanographic** (GeoMETOC) **Support Coordination** (GMSCE): Enhancing weather and ocean data for military planning.

8. **Future Medium-size Tactical Cargo** (FMTC): Developing next-generation transport aircraft.

9. **Strategic Air Transport for Outsized Cargo** (SATOC): Improving the EU's ability to move large military equipment.

10. **Critical Seabed Infrastructure Protection** (CSIP): Ensure the protection of infrastructures from natural events, intentional attacks and deliberate sabotage.

As part of the PESCO Secretariat, EDA coordinated the sixth wave of PESCO project evaluations and selections, resulting in the Council's approval of 11 new projects in May 2025. This wave addresses a broad spectrum of military needs, ranging from strategic areas such as air and missile defence and electronic warfare doctrine to tactical applications including soldier systems and field medical treatment facilities. Participating Member States are also tackling critical capability gaps by developing unmanned aerial systems, enhancing interoperability through equipment standardisation and strengthening the protection of vital underwater infrastructure. These projects anticipate future defence challenges, including the implications of quantum technologies, ensuring a reliable ammunition supply, and developing directed energy weapons.

Lastly, 2025 was the final year of PESCO's first phase. The Agency is shaping the second phase (2026-2030) through improvements to better address the evolving security environment. To that end, EDA prepared, together with the European External Action Service (EEAS) and the European Union Military Staff (EUMS), the High Representative's Annual Report on the Status of PESCO Implementation.

STRENGTHENING LAND FORCES

Loitering Munitions: EDA supported Member States by preparing a business case for possible joint acquisition of loitering munitions. A dedicated EDA study also examined lessons learned from Russia's illegal war of aggression against Ukraine, providing insights to guide EU capability development of loitering munitions.

Uncrewed Ground Systems (UGVs): EDA commissioned a study on uncrewed ground systems to assess operational lessons from the war in Ukraine. Building on the findings, a concept paper was developed to outline current capability gaps and propose collaborative EU opportunities for UGV development.

Personnel Recovery: Retrieving personnel from hostile environments requires coordination between the military, civilians, and the diplomatic corps. The Joint Personnel Recovery Education and Training Courses (JPR-ETC) project continued to deliver multinational personnel recovery training across Europe and remains open to all participating Member States.

Counter-IED training: In 2025, 18 multinational specialist training courses on neutralising explosive devices were conducted with EDA's support. These took place at the European Centre for Manual Neutralisation Capabilities (ECMAN) in Austria, the Joint Deployable Exploitation and Analysis Laboratory (JDEAL) in the Netherlands, and through the Military Search Capability Building (MSCB), in a unique contribution to European readiness and to EU citizens' security. The MSCB courses were conducted in Sweden, Ireland and Spain in 2025.

ENHANCING NAVAL CAPABILITIES

EDA's maritime projects cover a wide spectrum, from surveillance and critical infrastructure protection to underwater operations and naval combat. It continued it work supporting maritime PESCO projects (see earlier).

Maritime Surveillance (MARSUR): MARSUR III is laying the foundations for the future EU Maritime Surveillance Network. MARSUR III is focused on delivering the automated exchange of maritime surveillance information among the navies of 16 participating Member States. It enables secure,

real-time information sharing through a fully modernised system and network architecture. The project is embedded within the wider MARSUR community, a voluntary cooperation framework established in 2005 that brings together 23 European nations committed to enhancing maritime situational awareness. Through MARSUR III, participating navies benefit from strengthened cybersecurity, improved interoperability, enhanced data handling performance, and modernised map and visualisation services. A milestone was reached in April 2025, when the system achieved full interoperability with NATO systems, advancing joint maritime situational awareness and cooperative capabilities.

"MARSUR demonstrates how European navies can strengthen their collective maritime awareness through cooperation, trust and technical innovation. With MARSUR III, we are enhancing the network's capabilities to ensure that Member States can exchange information securely, efficiently and in full interoperability with partners such as NATO."

Gianluigi Lanzalaco
Project Officer Maritime Capabilities Support

European Combat Vessel (ECV): In 2025, work continued, with seven participating Member States aiming to have the new family of modular surface combatants (frigates) ready for service in the 2040s. Additional EU countries can still join the initiative. The European Combat Vessel is intended to respond to a broad range of naval shortfalls, from underwater and seabed control to cyber defence, missile defence and operations involving unmanned and autonomous systems.

REPMUS: In 2025, EDA, NATO and the Portuguese Navy co-organised the 15th Robotic Experimentation and Prototyping using Maritime Unmanned Systems (REPMUS), the world's largest event for testing unmanned maritime systems, held off the coast of Portugal. Running from 1 to 26 September in the waters south of Lisbon, the exercise brought together 24 nations and tested some 300 different uncrewed platforms across sea, air, and land domains. EDA conducted the second edition of the unmanned surface vessels (USV) Sense and Avoid experimentation exercise.

STRENGTHENING AIR DEFENCE

EDA took a leading role in supporting European cooperation on integrated air and missile defence in 2025. It also supported PESCO projects in the air domain (see page 14).

Integrated Air and Missile Defence (IAMD): Building on the concept paper for capability development opportunities on IAMD prepared in 2024, EDA shared an updated version in 2025 with EU industry and NATO. The document provides a common understanding of IAMD functions and identifies potential lines of action across short-, medium-, and long-term horizons. EDA prioritised supporting Member States in implementing the Letter of Intent on IAMD, signed at the end of 2024 by 19 Defence Ministers. Activities focus on short-term initiatives (see next chapter) and longer-term development, including an overarching EU IAMD approach covering early warning, counter-hypersonic and counter-swarming capabilities, as well as Joint All-Domain Command and Control. These are captured in the proposed synthesis of mid- to long-term pillars of action.

Emerging Technologies and Air Superiority: Looking to the mid- and long-term, a framework contract has been launched to assess the impact of Emerging and Disruptive Technologies (EDT) on air superiority. The first contract, addressing the integration of AI in air combat, is underway.

Tactical Air Transport Capabilities: In collaboration with Member State experts, EDA developed a concept paper on capability development for the European family of tactical air transport assets. This paper sets the foundation for potential future cooperation projects.

SATELLITE COMMUNICATIONS (SATCOM)

Currently EDA's largest project, the **EU SatCom Market (ESM)** helps provide commercially available satellite communications, and communications and information systems (CIS). Through the **GOVSATCOM DEMO** and the ESM, EDA provides 44 contributing members — including EU institutions, Member States, and CSDP missions — with secure, reliable, and cost-effective SatCom and broader CIS support for Common Security and Defence Policy (CSDP) operations.

ESM has seen a strong performance in its 2024–2028 framework contract. In just two years, 474 orders worth €136 million have been placed, compared with orders worth €75 million under the previous 2020–2024 contract. This represents an 80% increase in the average number of orders per year and a 263% rise in annual order value. In 2025 alone, nearly 300 new orders were received, totalling approximately €83 million. Since mid-2023, ESM has provided dedicated SatCom support to **Ukraine,** rapidly delivering critical capabilities. Close coordination with the Ukrainian Armed Forces ensures operational requirements are met promptly. The initiative can mobilise up to €130 million in commercial SatCom services, with two contributing members sponsoring a combined €5 million to date. Additional sponsorship discussions in 2025 are expected to finalise new support in 2026.

The **CIS framework contract** (2022–2028, ceiling €35 million) complements SatCom by delivering CIS solutions, including deployable communication systems, and advanced cybersecurity and data handling. Since 2022, demand has doubled, with €27 million already implemented, particularly from Ministries of Defence.

The **GOVSATCOM DEMO,** leveraging pooled governmental resources, continues to grow, with discussions underway to welcome new contributing members. In 2025, six new service requests were received, valued at approximately €11 million. GOVSATCOM's portfolio includes enhanced secure communications, such as SpainSat NG I and expanded bandwidth, and is being revised to include Medium Earth Orbit (MEO)- and Low Earth Orbit (LEO)- managed services.

"In 2025, satellite communications proved to be a key European defence capability, supporting missions and operations while linking armed forces across continents. Through the EDA's SatCom Service Programme, which includes the EU SatCom Market and GOVSATCOM, EDA is developing a highly capable and integrated satellite communications ecosystem."

Heinrich Krispler
Project Officer Support to EU Operations

Defence in space: Under the EU Space Strategy for Security and Defence (EUSSSD), EDA delivered its three mandated tasks through the Defence in Space Forum. This included identifying critical space technologies and associated mitigation measures, as well as completing a study on education and training for space security and defence. The outcomes of these activities have enabled their transfer to the European Space and Defence College (ESDC) for implementation.

CYBER DEFENCE, A VITAL DOMAIN

In 2025, EDA developed its programme Cyber Defence Exercises (CyDef-X). This initiative aims to enhance cyber education, training, and exercises, improve information sharing, and strengthen the EU's resilience against cyber threats. Progress was also made on the Military Computer Emergency Response Teams (milCERT) Operational Network (MICNET), which reached initial operational capability. In October, the annual exercise MIC25 took place.

Cyber defence deploy capability: EDA ran a tabletop experiment in September 2025 to test and validate the military concept of a deployable, non-fixed Security Operation Center (SOC). The experiment assessed how the SOC could meet operational requirements across scenarios of varying intensity.

MILITARY MOBILITY

Military mobility is central to ensuring the swift, safe, and efficient movement of military personnel and equipment across Europe — whether for operations, exercises, or daily activities. In 2025, EDA continued to improve cross-border movement procedures across land, air, and sea. EDA has completed the development of a new management platform to facilitate diplomatic clearances, the Military Mobility Air Portal (MMAP).

To streamline military requirements for customs processes, EDA is also assessing the use of electronic data processing to facilitate information exchange between armed forces and customs authorities. This work aligns with the European Commission's regulation proposal/Military Mobility Package and the aim to develop a secure and restricted Military Mobility Digital Information System for all military transport permission, traffic arrangements and for customs formalities.

Furthermore, EDA has carried out several studies on different modes of transport to identify gaps in infrastructure, assets and areas where legislation needs improvement. Building on this, future areas of activity are now being analysed together with the Member States.

"Our work focuses on removing bureaucratic and legal obstacles, and the collective effort is now reflected in the Commission's Military Mobility Package and the ambition to establish an EU Military Mobility Area by 2027."

Patrik Loosen and Krasimir Ganchev
Project Officers Military Mobility

SUSTAINABLE AND AGILE LOGISTICS

Efficient logistics are essential for military readiness. In 2025, **additive manufacturing** was again a key focus area. EDA's Additive Manufacturing for Logistic Support (AMLS), a project to establish common standards and improve spare parts interchangeability among Member States, expanded to 10 EU states plus Norway. The Agency also hosted the AM Symposium workshop in Bonn, bringing together military, industry, and academic experts to accelerate developments in this field. Ukraine has shown strong interest in additive manufacturing, and under Ukraine's Administrative Arrangement with EDA, the Agency is actively involving the country in all related activities.

Other logistics developments in 2025 include work on a **Federated Logistic Communication Network,** which will facilitate information sharing among Member States, and the expansion of the Sharing of Spare Parts project.

STRENGTHENING COMMAND, CONTROL, AND CYBER SITUATIONAL AWARENESS

Reliable communication and information systems are the backbone of military operations. In 2025, EDA continued to manage major projects funded by the European Commission under the EDIDP and EDF programmes, including the **European Command and Control** (EC2). It is designed to enhance information-sharing and decision-making capabilities for military operations. EDA is responsible for managing both the European Commission grant and direct funding from interested Member States.

In 2025, EDA also worked closely with the EU Satellite Centre (SatCen) to promote and implement an updated Geospatial Information Hub **(GeoHuB)**. This tool enhances decision-making at EU Operational Headquarters by providing a comprehensive viewer and content management system for geospatial data. Looking ahead, EDA is preparing a capability development programme on geospatial, meteorological, and oceanographic **(GEOMETOC)** information to further support CSDP missions and operations.

CBRN DEFENCE

Chemical, Biological, Radiological, and Nuclear (CBRN) defence is essential for protecting both armed forces and civilians. In 2025, the Chemical, Biological, Radiological, and Nuclear Surveillance as a Service (CBRN SaaS) continued into its second phase, while two field tests reviewed its implementation in national structures.

Additionally, the Agency began finalising the CBRN Knowledge base (CBRN-KB), an online database that will provide Member States and stakeholders with validated information, improving knowledge-sharing and coordination in the CBRN sector. In March 2025, EDA conducted its first CBRN Live Agent Training pilot course for specialised units, trained at a site in Slovakia.

AIRWORTHINESS

EDA continued to promote a common European approach to military aircraft certification and maintenance through the European Military Airworthiness Requirements (EMARs), which are now widely adopted by Member States and several third countries as the global reference standard for military airworthiness. The Military Airworthiness Authorities (MAWA) Forum and its advisory groups, supported by EDA's Airworthiness Office, revised and updated the EMARs and associated documents to ensure they remain current and fit for purpose.

In response to the evolving geopolitical environment and participating Member States' need for greater operational flexibility, the MAWA Forum developed a new European Military Airworthiness Document (EMAD). This document provides harmonised guidelines on how to derogate from the EMAR framework in times of crisis, enabling more agile use of military aircraft when required. To address the rapid expansion in the use of Unmanned Aircraft Systems (UAS), the MAWA Forum also initiated the development of dedicated EMARs tailored to UAS.

AIRMEDEVAC

EDA has played a behind-the-scenes role in aeromedical evacuation, giving EU armed forces access to air medical evacuation services. By agreeing framework contracts ahead of time with providers – on behalf of parties including EU Member States, EU entities and EU military missions – EDA then sets the ground for specialists in military air medical evacuation to compete to offer the best and most cost-effective service. In 2025, EDA partially renewed its framework contracting structure established in 2023, which is divided into multiple lots with a combined value of €140 million. Half of these lots were relaunched last year, while the remaining lots, valid until 2027, are scheduled for relaunch in 2026. The overall ceiling amount is unchanged. EDA has so far signed and managed seven specific contracts delivering services in the African region in support of Belgium, Germany, and EU missions. In 2025, the project arrangement was expanded to include two new members: France and the EU mission EUCAP Sahel. They can join future contracts with service providers.

TEST AND EVALUATION

Since its founding in 2004, EDA has prioritised the development of Test and Evaluation (T&E) centres for defence systems, creating a connected network that remains one of the agency's longest-running initiatives. In 2025, EDA, alongside the EU Military Staff (EUMS), began implementing its T&E strategy for 2025-2035. Meanwhile, the Defence Test and Evaluation Base (DTEB) supported the Hub for EU Defence Innovation (HEDI) in testing autonomous systems for cross-domain logistics in 2025.

BUYING TOGETHER

Core Task Four: Facilitating joint procurement, enabling Member States to address capability gaps efficiently and cost-effectively.

"In 2025, we finalised the aggregation of demand for ammunition from participating Member States. From there, we were empowered to prioritise certain off-the-shelf ammunition types for future procurement procedures. There is strong interest in small arms ammunition, autocanonn ammunition and 155mm artillery ammunition."

Oisín Moore
Project Officer Ammunition

The need for better coordination in defence spending has never been greater. Given the growing security challenges, EU countries are working together to identify common defence needs, agree on their needs and where possible carry out **joint procurement**, with a single buyer to drive down the cost of armaments. Aggregating demand is the process of combining the needs and orders of multiple buyers to achieve more efficient purchasing.

WHY AGGREGATING DEMAND MATTERS

- Stronger coordination: Harmonising Member States' needs prevents market fragmentation.
- Better value for money: Bulk purchasing reduces costs and prevents internal arms races.
- Faster delivery: Standardised requirements allow for more efficient production and distribution.
- Strengthened European industry: Ensures EU defence manufacturers can meet large-scale demands while improving the security of supply at the European level.

Instead of each Member State independently defining and purchasing equipment, EDA helps ensure that defence investments are more efficient. This contributes to reinforcing **the European Defence Technological and Industrial Base** (EDTIB) by creating predictable and coherent demand. The availability of critical defence items, such as equipment and ammunition, and the ability to procure them at an affordable price, are decisive factors that directly impact the readiness of Member States' armed forces and their ability to fulfil their missions.

ENHANCING EDA'S APPROACH TO DEMAND AGGREGATION AND PROCUREMENT

Building upon its existing consultation mechanisms and forums with Member States, and drawing from preliminary capability development efforts, EDA has structured and streamlined its approach to promote and support joint procurement of defence products and services among Member States.

This activity first involves aggregating Member States' demands for defence products and services that could potentially be jointly procured, followed by the harmonisation of these demands. Based on specifications consolidated among interested Member States, the Agency consults European economic actors to assess their capacity to meet the demand and to prepare appropriate procurement options.

These options are then evaluated against potential support and incentives from various EU instruments aimed at encouraging collaborative procurement and cross-border production, in line with the **European Defence Industrial Strategy** (EDIS).

The options are ultimately presented and analysed in a business case, which outlines the aggregated and consolidated demand in its first section.

These activities do not pre-empt any decision regarding the choice of procurement agent. The EDA framework remains an option, limited to cases that align with the Agency's expertise and capacity for procurement from the EDTIB of so-called off-the-shelf products, meaning that they are already manufactured and readily available. Other options include international organisations such as Organisation for Joint Armament Cooperation (OCCAR) or lead nations, with the final decision resting in the hands of the interested Member States.

"EDA's joint procurement brings together pan-European demand and turns it into robust, legally compliant, operationally effective contracts. In doing so, EDA actively supports and strengthens the European Defence Technological and Industrial Base through the cross-border participation of industry."

Simone Gariglio
Procurement and Contract Officer

EDA AS A PROCUREMENT AGENT

Member States may choose to jointly procure off-the-shelf defence products from the EDTIB through EDA's framework. EDA has incorporated lessons learned from previous joint procurement projects to standardise arrangements negotiated with Member States when launching such initiatives. This significantly reduces administrative burdens and accelerates timelines for future projects.

AMMUNITION

EDA's ammunition procurement efforts in 2025 focused on:

- 155mm artillery ammunition, and
- 84mm Carl Gustaf anti-tank / multi-use ammunition

EDA launched the Collaborative Procurement of Ammunition (CPoA) project in 2023, involving 27 Member States and Norway. Its goal is to enable collaborative procurement of **six ammunition types:** artillery, tank, anti-tank, mortar, autocannon, and small arms. The project has made significant progress. Building on 60 framework contracts signed with European industry, execution of joint orders for 155 mm artillery ammunition worth over €375 million continued throughout 2025. All-Up Rounds (AURs) and their respective elements are compatible with four different European-made howitzers (*CAESAR, Krab, Panzerhaubitze 2000 and Zuzana*).

On 10 June, EDA signed a framework contract with a European manufacturer for various types of **84 mm Carl Gustaf anti-tank/multi-use ammunition,** including 12 combat and six training types. Several Member States have placed national procurement orders with EDA for this ammunition, which the Agency consolidated into single joint orders. The prior aggregation of Member States' ammunition demands, initiated in June 2024, was completed in July 2025. The aggregation showed that, of the six categories of ammunition under CPoA, the greatest demand is for small arms ammunition, auto-cannon ammunition, and 155mm artillery ammunition.

SOLDIER EQUIPMENT

Members States identified the availability of protective gear for the soldier as a critical shortfall. EDA is supporting Member States through the Collaborative Procurement of Soldier Equipment project (CPoSoEq), which aims to collaboratively procure two types of soldier equipment specifically designed for use by the armed forces: helmets and body armour.

The project was launched in June 2023 with eight contributing Member States to replenish stocks of these types of soldier equipment. Since then, participation in the project has grown to 11 Member States. EDA's approach is based on aggregating demand, with EDA acting as the contracting authority. In 2025, Member State experts provided requirements, enhancing collaboration, standardisation and interoperability. A preliminary market consultation was conducted by EDA in 2025, identifying the industrial landscape for this type of equipment.

CBRN EQUIPMENT

The availability of chemical, biological, radiological and nuclear (CBRN) equipment and stockpiles is critical for Member States. EDA is addressing this through the CPoCBRN project, which aims to collaboratively procure three types of protective equipment for armed forces operating in CBRN environments: **CBRN protective masks**, **CBRN protective filters and CBRN protective suits** (including jackets and trousers, overboots, gloves, and undergloves).

Similarly to CPoSoEq, the project was launched in June 2023 with eight Member States. Participation has since grown to 11 Member States. EDA's approach is based on aggregating demand, with EDA acting as the contracting authority. Technical requirements for the equipment were harmonised in 2025. Two framework contracts for CBRN suits were signed in October, while the procurement process for masks and filters is ongoing. The contracts run for five years, with a possible two-year extension, and Member States have already begun placing orders.

FLIGHT SUITS

Following a request from three Member States, EDA established a project for flame-retardant flight suits in 2022. In 2025, the first orders were placed on behalf of Austria, Cyprus, and Slovenia, with deliveries completed in September. This successful delivery is expected to encourage further EU Member States to join the initiative.

LOITERING MUNITIONS

Following the letter of intent on Loitering Munitions signed by 18 Ministries of Defence, EDA conducted expert-level discussions in January 2025 to develop a business case for joint procurement. Endorsed in September 2025, the case enables 16 participating Member States to begin procurement based on national demand.

"The joint procurement of flame-retardant products is a tangible illustration of the benefits of cooperation through EDA. Critical mass gave access to a specialised market and procurement of a high-quality product that would have been extremely difficult, if not impossible, for one Member State alone."

Thierry Coupeau
Project Officer Operations, Training and Exercises Unit

WORKING WITH INDUSTRY, GIVING THE MILITARY A VOICE

Core Task Five: Representing defence interests at the EU-level, ensuring that Ministries of Defence have a strong voice in shaping policy.

"In 2025, the EU took significant steps to ramp up support for the EDTIB. EDA also stepped up, supporting and engaging with industry to help meet the goal of EU defence readiness by 2030. This includes providing expert support to EU legislative processes, mapping industry challenges and ensuring EDA tools are fit for purpose."

Carl-Johan Lind
Policy Officer Industry Engagement and EU Policies

At a time of upheaval in the world, the European Union's armed forces are accelerating their modernisation. EDA acts on behalf of Member States as EU-level plans, policies and programmes are developed. By connecting national Ministries of Defence with EU institutions, the Agency makes certain that military priorities are fully integrated into decisions that will shape Europe's future security architecture.

In 2025, the EDA played an important role in advancing the EU's strategic agenda, particularly through its contribution to the **White Paper for European Defence Readiness 2030**. It is now working closely with the European Commission, the European External Action Service (EEAS) and the European Union Military Staff (EUMS) to carry forward and implement agreed actions.

Other important strategies to which EDA contributed in 2025 include the updated **EU Maritime Security Strategy (EUMSS) Action Plan** and the **Action Plan on Military Mobility 2.0,** as well as the **Military Mobility package,** the **EU Space Strategy for Security and Defence (EUSSSD),** the **EU Space Programme** and the **EU Policy on Cyber Defence,** among others. EDA also continued to work for greater access to finance for the European defence industry.

EDA MARKS A YEAR AS ADVISER TO THE EIB ON FINANCING PROJECTS IN DEFENCE

In 2025, EDA advised the European Investment Bank (EIB) on EU projects in defence seeking financing worth up to €700 million. These are projects aligned with EU defence priorities and mark a significant shift in the EIB Group's engagement with the sector, with more than €4 billion invested in security and defence in 2025. The funding is targeting infrastructure, research and development and supply chain resilience, reflecting a broader push to reinforce Europe's strategic autonomy amid heightened geopolitical tensions.

Building on the Memorandum of Understanding (MoU) signed in 2018, an updated agreement between the EIB and EDA was signed on 3 October 2024 and serves as the basis of 2025's progress. It aims to facilitate access to finance for companies, particularly small and medium-sized enterprises, working on projects that contribute to capability development, innovation and industrial competitiveness.

COOPERATIVE FINANCIAL MECHANISM (CFM)

The Cooperative Financial Mechanism (CFM) is a funding tool designed to help EU Member States collaborate on defence projects by offering inter-state support and access to European Investment Bank (EIB) loans. One Member State used the CFM in 2025 to finance projects in which it was involved. Several others have expressed interest.

The CFM addresses financial barriers to joint defence projects, such as mismatched budget cycles and the pressure to spend funds before year-end deadlines. It offers two key pillars of support:

- State-to-state support: National defence ministries can support other Member States experiencing temporary budgetary shortfalls by issuing reimbursable advances against deferred payments.
- EIB support: Through existing framework loan agreements at national level, the EIB can support Member States experiencing temporary budgetary shortfalls, with short-term loans.

EDA oversees the mechanism, processing support requests and ensuring compliance with EU financial rules. The CFM allows Member States to carry over unspent funds across fiscal years, rather than returning them to national treasuries. This multi-year funding approach creates more stability for long-term defence cooperation.

EUROPE'S SHARED AIRSPACE

In aviation, the **Single European Sky** framework strengthens coordination between military and civilian air traffic management. Member States have tasked EDA with ensuring that military aviation continues to allow for effective defence, while upholding the safety of civil air traffic. In 2025, under the guidance of the EDA Single European Sky Military Aviation Board (ESMAB), work centred on three priorities:

Military access to airspace. Safeguards for military operations, now laid down in regulations, will improve the ability of EU air forces to train and operate in peacetime, crisis and conflict. In 2025, EDA worked on military unmanned air systems (UAS), launching projects on drone operations in GNSS/GPS-denied environments, developing a catalogue of over 300 unmanned aerial systems from more than 200 manufacturers to match capabilities with operational needs, and consolidating a concept of operations, CONOPS — how a system, capability, or operation is to be used for specific objectives.

Interoperability. Efforts focused on civil-military air traffic management data exchange and on ensuring interoperability as civilian communication, navigation and surveillance (CNS) systems are modernised, with resilience as a key objective. At the request of Latvia's Minister of Defence in 2025, EDA also developed a UAS training programme plan for implementation in 2026.

Resilience and cybersecurity. As aviation shifts towards satellite-based services and integrates emerging and disruptive technologies, protecting mission-critical information is increasingly complex. EDA continued developing the military CNS Strategy together with Member States and NATO.

EUROPE'S LARGEST DEFENCE ENERGY COMMUNITY

EDA has also been supporting Member States in adopting more sustainable energy practices in defence. Since 2015, the Agency has led the **Consultation Forum for Sustainable Energy in the Defence and Security Sector** (CF SEDSS), reinforcing the European Union's commitment to achieving net-zero greenhouse gas emissions by 2050.

The forum is now in its fourth phase, CF SEDSS IV (2024-2028), with a total budget of €3.37 million. Managed by EDA and funded mainly by the LIFE Clean Energy Transition sub-programme, it is Europe's largest defence energy community.

With the global defence sector responsible for up to 5.5% of worldwide CO_2 emissions, the fourth phase supports defence ministries in enhancing energy efficiency, integrating renewables, and strengthening energy security. The initiative is focusing on knowledge sharing, collaborative projects, studies, and policy roadmaps to address emerging energy challenges. It also organises high-level conferences, expert meetings, and a table-top exercise to explore trends such as electrification, advanced energy storage, digitalisation and protection of critical energy infrastructure.

The first CF SEDSS IV conference was held on 17–18 June in Warsaw, under the auspices of the Polish Presidency of the Council and hosted by Poland's Ministry of National Defence. The second took place on 2–3 December in Ljubljana, hosted by the Slovenian Ministry of Defence.

EDA has also been promoting the application of circular economy principles in the defence sector through the **Incubation Forum for Circular Economy in European Defence** (IF CEED). In addition to its overall sustainability benefits, circular economy has operational advantages, as it reduces reliance on external sources of supply, in particular during operations and at the end of the life of military equipment. This initiative has launched projects such as a Digital Product Passport for body armour, designed to improve sustainability in military equipment production.

"Sustainable energy models also help make the defence sector more resilient and autonomous, particularly as energy is increasingly recognised as a key capability and protecting critical energy infrastructure in defence has become a major military requirement."

Shana Leclercq
Project Officer Energy Support

WORKING WITH THE WIDER DEFENCE COMMUNITY

"At EDA, our policy work helps Member States translate strategic priorities into concrete action. In my role, I support them in shaping their positions and navigating an increasingly complex European defence landscape, while ensuring their perspectives are heard across the broader EU institutional framework. As EU defence initiatives multiply, keeping Member States firmly in the driving seat has never been more important."

Maria Peteinoudi
Policy Officer Chief Executive's Policy Office

Four years of full-scale war in Ukraine and shifts underway across the Atlantic have made clear that Member States' security depends on robust capabilities, sufficient supplies, and a resilient European defence industry. Meeting these challenges calls for close cooperation across the Union. Equally, defence innovation is central to countering tomorrow's threats and can only be developed by working hand in hand with our partners.

RELATIONS WITH THIRD PARTIES

To date, the Agency has tailored relations with the countries, EU bodies and multinational organisations with which it has concluded an **Administrative Arrangement (AA): Norway, Switzerland, Serbia,**

Ukraine, and the **United States,** as well as with the **European Space Agency** (ESA) and **OCCAR.** In 2025, the Agency continued to deepen its cooperation with Norway, Switzerland and Ukraine, as well as with ESA and OCCAR. In the context of the third **Joint Declaration on EU-NATO Cooperation,** the cooperation between EDA and NATO continued across all aspects of defence planning and capability development, readiness, innovation and on projects such as Military Mobility.

ADMINISTRATIVE ARRANGEMENT (AA) COUNTRIES

EDA strengthened its engagement with AA countries in 2025. **Norway** remains the most involved, participating across all four areas with over 30 associated work strands, particularly in Research & Technology (R&T).

Cooperation with **Switzerland** expanded significantly, leading to an updated Administrative Arrangement to reflect the deeper engagement, allowing structured access to the full range of EDA programmes. These cover research, innovation, capability development, joint procurement, and training. The focus remains on R&T and innovation, including Switzerland's participation in the Hub for European Defence Innovation (HEDI).

The Agency remains fully committed to contributing to the EU's coordinated efforts in support of Ukraine. **Ukraine** worked closely with EDA to share lessons from the war and explore areas of support. In 2025, the Ukrainian Ministry of Defence joined HEDI's Operational Experimentation (OPEX) Campaign in Italy, the European Defence Innovation Days in Poland, technical workshops with Member States, and EDA conferences on drones and airworthiness.

Engagement with the **United States** Department of War (formerly Department of Defense) has continued based on the April 2023 Administrative Arrangement on specific work strands such as the impact of EU REACH regulation or standardisation.

Serbia's cooperation remains limited due to its 2022 suspension of multinational exercises, though it continues to participate in the Consultation Forum on Sustainable Energy in the Defence and Security Sector (CF SEDSS) and the Single European Sky Military Aviation Board (ESMAB).

ADMINISTRATIVE ARRANGEMENT (AA) ORGANISATIONS

EDA's cooperation with the European Space Agency **(ESA)** progressed in space-related working bodies and projects, including GOVSATCOM/ Secure SatCom, Cyber Defence for Space, Earth Observation (EO), Unmanned Maritime Systems (UMS), and Guidance, Navigation, and Control (GNC).

Collaboration with **OCCAR** continued under the 2012 Administrative Arrangement, with regular exchanges and EDA support for the second phase of the European MALE RPAS programme.

EU-NATO COOPERATION

EDA's cooperation with NATO remains guided by the EU-NATO Joint Declarations and the related common actions and is undertaken in line with the agreed principles. It focuses on ensuring coherence between EU and NATO defence planning processes, and respective capability development efforts. It covers Military Mobility, cyber, hybrid threats, air-to-air refuelling, military aviation, airworthiness, and standardisation, as highlighted in the 10th EU-NATO progress report in June 2025. In 2025, NATO and EDA maintained regular cross-briefings, focusing on supporting Member States and NATO allies to meet capability objectives. EDA's chief executive held frequent meetings with senior NATO staff.

MCDC

Additionally, EDA, alongside the EU Military Staff (EUMS), actively participated in three initiatives within the Multinational Capability Development Campaign (MCDC), a multinational framework led by the United States with 23 partner countries and organisations dedicated to multinational defence projects.

OTHER PARTNERS

The cooperation with other partners such as the European Aviation Safety Agency (EASA), EUROCONTROL, the Single European Sky Air Traffic Research Joint Undertaking (SESAR JU), SESAR Deployment Alliance, SESAR Deployment Manager, EU SatCen, and European Security and Defence College continued in their respective areas of activity.

FACTS AND FIGURES

DEFENCE DATA

EDA published its annual defence data report for 2024 and projections for 2025 in September 2025, detailing defence spending by **EDA's 27 Member States.**

In 2024, defence expenditure by the 27 EU Member States reached an unprecedented €343 billion — a 19% rise on 2023 — bringing spending to 1.9% of GDP. The increase, driven largely by record levels of equipment procurement and rising investment in research and development, reflects Member States' determination to strengthen Europe's military capabilities in response to the evolving security environment.

For the first time, defence investment exceeded €100 billion, accounting for 31% of total expenditure, the highest share recorded by EDA since data collection began. While spending continues to grow and is forecast to climb further in 2025, it remains below the levels of military powers such as the United States — underlining the need for sustained investment and greater collaboration to maximise efficiency and ensure interoperability across the EU's armed forces.

EDA forecasted the following spending data for 2025: EU defence spending is projected to reach €381 billion in 2025 (vs €343 billion in 2024). EU spending is seen at 2.1% of GDP in 2025, exceeding the previous NATO 2% target for the first time since EDA records began. Defence investment is set to reach close to €130 billion in 2025 (vs €106 billion in 2024). Research and Development (R&D) spending may increase to €17 billion in 2025 (vs €13 billion in 2024).

Note: 2025 figures are provided in 2024 prices.

NEW CHIEF EXECUTIVE

EU Member States appointed André Denk as Chief Executive of EDA on 5 May 2025, following a recommendation by the Head of the Agency Kaja Kallas. His mandate officially started on 16 May. He is the first military official to lead the Agency since its creation. Lieutenant General Denk brings with him four decades of military and operational experience across European and international defence structures. Prior to his appointment, he served as EDA's Deputy Chief Executive from February 2023. Before joining the EDA, Denk served as Director of Logistics of the EU Military Staff. He previously commanded the Joint School of Logistics in Germany and held various command positions within the Bundeswehr. Throughout his military career, Denk undertook numerous international deployments under EU, UN, and NATO mandates, including operations in Bosnia and Herzegovina, Afghanistan, and as Chief of Staff of the EU Training Mission in Mali.

NEW BUILDING PROJECT

In February 2024, EDA awarded the contract for its new headquarters. Following the completion of due diligence, contract finalisation, and the implementation of fit-out arrangements, EDA signed a 15-year lease agreement for its future building on Rue d'Arlon, Brussels, Belgium. The project is progressing as planned, with the building handover expected in April 2026. Preparation and planning are underway for EDA's own fit-out starting immediately after the building is accepted and taken over. EDA aims to complete its relocation no later than 30 June 2027.

EU CLASSIFIED INFORMATION - HANDLING OF ELECTRONIC CLASSIFIED INFORMATION

The Agency is implementing a roadmap improving the efficiency of managing electronic EU Classified Information (EUCI). This initiative will progress through a proof of concept towards the gradual deployment of the solution with the aim of reaching full operational capability after 2027. Importantly, initial operational capability covering most of the Agency's EUCI requirements will be aligned with the new building project. This plan aims to ensure secure connectivity, seamless collaboration, and effective integration with other EU bodies, leveraging established European Commission solutions while incorporating feedback and technical expertise from the Member States.

EDA ANNUAL CONFERENCE 2025

EDA held its annual conference, *"New horizons in EU defence: enhancing ambitions, accelerating actions,"* on 22 January 2025 in Brussels and online, marking the Agency's 20th anniversary. The event gathered over 400 in-person participants and more than 800 online attendees, providing a high-level forum to reflect on the Agency's evolution and address key challenges in European defence. In her keynote intervention,

Kaja Kallas, High Representative of the Union for Foreign Affairs and Security Policy, Vice-President of the European Commission, and Head of EDA, called for greater consolidation of the European defence industry, the development of common weapons systems, and progress towards a Single Market for defence. She emphasised the urgency of enhancing interoperability and scaling up efforts in response to the evolving threat environment. Andrius Kubilius, European Commissioner for Defence and Space, stressed the scale of existing capability shortfalls and called for a more ambitious, coordinated approach to defence production and procurement at European level, drawing on successful models of cooperation such as Galileo. NATO Deputy Secretary General Radmila Shekerinska also addressed the conference praising the deepening partnership between NATO and the EU over recent years and called on even closer cooperation.

"The annual conference is the European Defence Agency's yearly flagship event. In recent years, the conference has achieved exceptional recognition and widespread media attention, cementing its status as one of Brussels' most anticipated and influential defence forums."

Andrea Perasso
Media & Communication Assistant

EDA PORTFOLIO

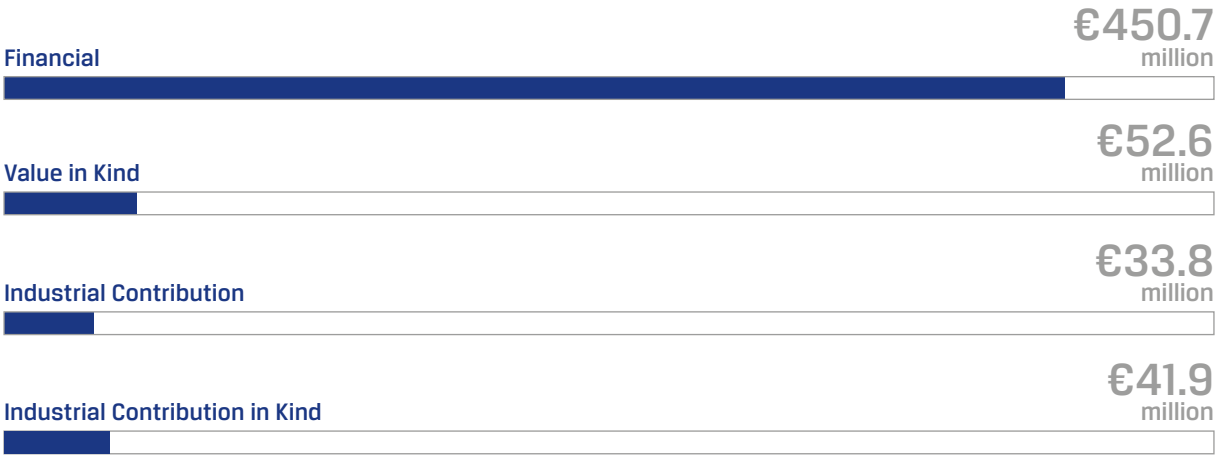
NUMBER OF EDA CAPABILITY AND R&T PROJECTS IN 2025: €558 MILLION

- Ad hoc capability and R&T: **87 (35 CAP, 52 R&T)**
- EDA Operational Budget: **€9.13 million**
- EDA support to PESCO projects (including those in an EDA framework): **10**
- EDA support to European Defence Fund projects: **42, worth over €300 million**

NUMBER OF PROJECTS, PROGRAMMES AND ACTIVITIES WHICH WERE IN PROGRESS AT YEAR-END 2025: 516

MEMBER STATES' CONTRIBUTION TO AD HOC CAPABILITY DEVELOPMENT AND R&T PROGRAMMES AND PROJECTS (NOT INCLUDING PESCO NOR 155MM AMMUNITION PROCUREMENT) WITH EFFECT END – 2025

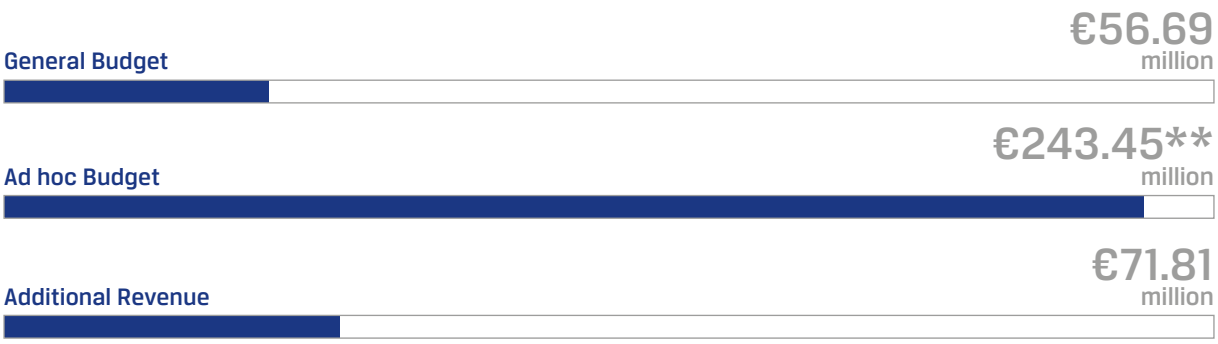
TOTAL: € 585.65 MILLION



EDA BUDGET 2025

EDA's budget consists of the general budget, the budgets associated with ad hoc projects or programmes and budgets resulting from additional revenue.

TOTAL: €371.9 MILLION*



*2025 figures are provisional.

**Ad hoc budget figures include only financial contributions directly managed by EDA.

EDA STAFF

Contact type

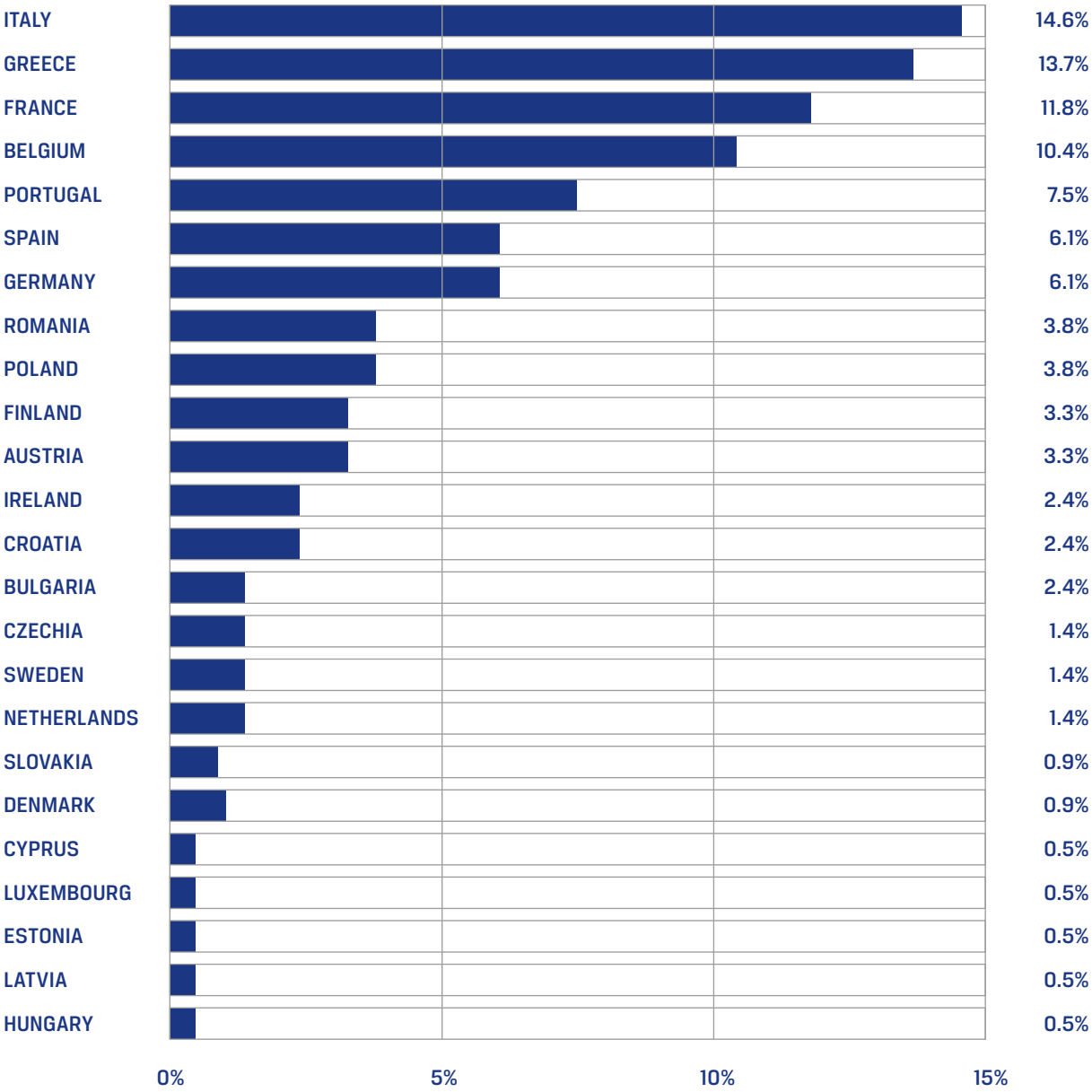
Temporary Agent	117
Contract Agent	72
Seconded National Experts	23

212
TOTAL

Gender distribution

Feminine 35%
Masculine 65%

NATIONALITY DISTRIBUTION



EDA MANAGEMENT

YOUR EDA AS OF APRIL 2026

Kaja KALLAS
Head of the European Defence Agency,
in her role as High Representative of the Union
for Foreign Affairs & Security Policy/Vice-President
of the European Commission

André DENK
Chief Executive

Anders SJÖBORG
Deputy Chief Executive

Stefano CONT
Director Capability, Armament and Planning (CAP); Acting Deputy Chief Executive from May 2025 until March 2026

Nathalie GUICHARD
Director Research, Technology & Innovation (RTI)

Baudouin HEUNINCKX
Acting Director Industry, Synergies & Enablers (ISE)

Ginette MANDERSCHEID
Director Corporate Services Directorate (CSD)

Editor: Robin Emmott, EDA

For more information about the European Defence Agency, please see our website: www. eda.europa.eu and our biannual magazine, European Defence Matters

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