EUROPEAN DEFENCE AGENCY

ANNUAL REPORT 2024

FOREWORD

20 YEARS PROMOTING EUROPEAN DEFENCE COOPERATION 2004–2024

By Jiří Šedivý
Chief Executive

As Russia's war of aggression against Ukraine enters its fourth year, the need for a strong, resilient, and coordinated European defence is greater than ever. Large-scale, high-intensity warfare, great power competition, sectarian strife in our neighbourhood and shifting geopolitics show that our security cannot be taken for granted. The European Union and its Member States must have the means to protect themselves, in support of NATO, alone if necessary. This new era demands bold decisions and action.

A strong public understanding of the threats Europe faces is crucial, and so too is an awareness of the steps that have already been taken. Our European Defence Agency (EDA) annual report is part of that outreach. Encouragingly, close to 80% of Europeans support a common defence and security policy among EU nations and more than 70% agree that the EU must strengthen its ability to produce military equipment.

Since 2004, EDA has been seeking to move beyond 'national champions' and the 'national preference' so that we can spend more, spend together and spend better. Our work over the past two decades has included: initiating the now fully-operational Multinational Multi-Role Tanker Transport Fleet; the Multinational Helicopter Training Programme now based in Portugal; managing the EU Satellite Communications Market; and advancing maritime surveillance technology. EDA contributes not only to large-scale projects but also to smaller advancements, such as new camouflage technologies and mine sweeping.

Celebrating its 20th anniversary in 2024, EDA has reinforced its position as the backbone of European defence cooperation, helping our nations respond to today's challenges while preparing for future warfare.

Last year, Ministers of Defence strengthened EDA's role, giving the Agency a mandate to support capability development at every stage. We call it the 2024 Long-Term Review. The Agency now takes on a greater role in joint procurement and innovation.

EDA is focusing on five core tasks:

1. Identifying shared capability needs and priorities at EU level to ensure that EU Member States' armed forces have the capabilities they actually require;

2. Encouraging collaborative research, technology, and innovation to maintain Europe's technological edge in defence;

3. Harmonising military requirements and engaging in joint capability development, while ensuring that equipment and assets can be interoperable between Member States;

4. Facilitating joint procurement, enabling Member States to address capability gaps efficiently and cost-effectively;

5. Representing defence interests at the EU level, ensuring that Ministries of Defence have a strong voice in shaping policy.

Meanwhile in 2024, EDA cemented its position as the leading EU platform for collaborative defence research, already managing or negotiating to take on a total of more than 100 Research and Technology (R&T) projects worth €681 million. This is an unprecedented level of investment.

A coordinated approach to defence planning is central to allowing militaries to work together — our interoperability. We have outlined the way forward on integrated air and missile defence, electronic warfare, loitering munitions, and a European combat vessel. Member States have now signed letters of intent to work together in these areas.

Our pragmatic approach is also clear in the way we jointly procured 155mm artillery ammunition on behalf of Member States and for Ukraine in 2024. Forming and strengthening relations with our friends is crucial too. EDA deepened its cooperation with Norway, Switzerland, Ukraine and the United States in 2024.

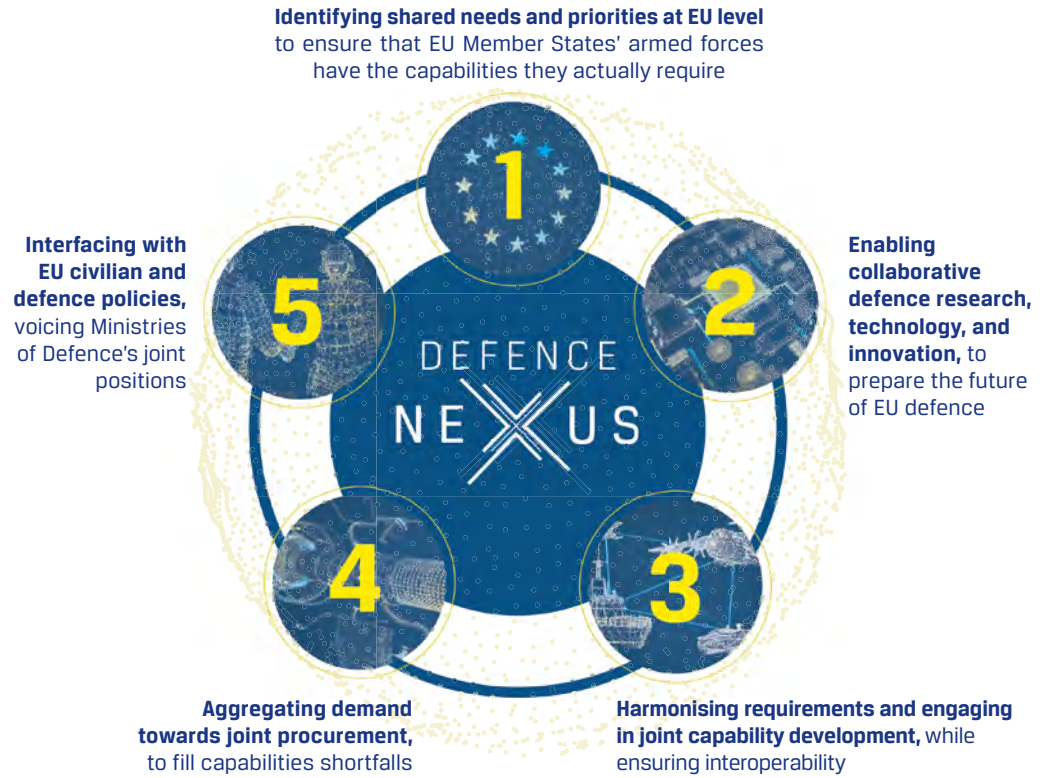
"U.S. warnings are clear: Europe must spend more on defence. By investing and innovating together – using EDA and Europe's defence industry – EU Member States can develop and deliver weapons and capabilities in support of EU defence and NATO. We owe it to our citizens. We can no longer take peace for granted."

Jiří Šedivý
Chief Executive

Switzerland's participation in HEDI has deepened EU-Swiss collaboration on defence innovation, while EDA's engagement with Ukraine has expanded, particularly in the field of autonomous systems.

Throughout 2024, EDA has remained steadfast in its mission: to strengthen European defence through collaboration, innovation, and capability development. Guided by the EU strategies of recent years — the Strategic Compass, the Versailles Declaration, and the European Defence Industrial Strategy — EDA is contributing to capability development, innovation and industrial cooperation.

After 20 years, so much more must be done. The challenge will require greater resources, deeper collaboration, and the trust and support of European citizens.



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 European Defence Agency (EDA) supports its Member States in developing stronger defence capabilities through European cooperation. By encouraging collaboration, EDA helps Ministries of Defence align their national priorities with wider EU initiatives, ensuring a more coordinated approach to security and defence.

IMPLEMENTATION OF THE EU CAPABILITY DEVELOPMENT PRIORITIES (CDP)

The implementation of the 2023 EU Capability Development Priorities remained the central focus of EDA's activities in 2024, with improvements and refinements to enhance the process.

The 22 Capability Development Priorities, approved by EU Ministers of Defence in 2023, address all five military domains, as well as strategic enablers and force multipliers. They cover the full spectrum of Member States' military requirements — from cyber and hybrid threats to high-intensity warfare — both now and in the future. These priorities serve as a guiding framework for national capability planning and development, fostering coherence and collaboration across the EU. As such, they provide the reference point for all EU-level defence initiatives.

In 2024, EDA focused on paving the way for the practical implementation of these priorities in a collaborative manner, supporting Member States along two strands of work.

CARD: REVIEWING MEMBER STATES' PLANS TO IDENTIFY OPPORTUNITIES FOR COOPERATION

Firstly, EDA completed the third **Coordinated Annual Review on Defence** (CARD) in 2024. This review remains a critical instrument for structured dialogue with the 27 Member States on their national military needs, capability objectives, and cooperation plans within the EU framework.

Published in November, the 2024 CARD Report provided a comprehensive overview of the current 'State of the Union' in terms of defence spending, investment, research and technology, and cooperation. It identified key trends, gaps, and opportunities for collaboration across all areas, including research and technology, capability development, armament procurement, and operational improvements. Ministers of Defence welcomed the report's sharp focus on shared challenges and opportunities.

As a direct outcome of the review, four letters of intent were signed by a significant number of Member States, covering critical and mature areas such as integrated air and missile defence, loitering munitions, electronic warfare, and a European combat vessel (see Core Task 3).

While these agreements mark an important step towards aligning national priorities in key domains, the next phase will focus on translating these commitments into concrete cooperative projects. The full report is available here: CARD Report 2024

"As we concentrate on higher-intensity defence, planning remains at the forefront of our efforts. We help EU Member States in NATO meet their capability targets and, in coherence with the alliance, reinforce Europe's collective defence."

André Denk
Deputy Chief Executive

"The successful conclusion of the third CARD cycle, marked by the signature of four letters of intent, highlights our progress and sets the stage for the next challenge: moving to action through the generation of concrete cooperation projects."

Elias Hadjikoumis
CARD Coordinator

GUIDING COLLABORATIVE PLANNING AND CAPABILITY DEVELOPMENT

The second strand of work for implementing the Capability Development Priorities has been the creation of structured roadmaps to guide collaborative planning and capability development.

Using data gathered from the CARD process, the EDA developed a **Priority Implementation Roadmap** (PIR) for each priority. For the first time at the EU level, these roadmaps set out clear capability objectives, presented as a series of actionable steps to be achieved in the short, medium, and long term. They also outline potential collaborative initiatives to support these goals.

By offering EU-wide visibility on capability needs and timelines, these roadmaps facilitate the harmonisation of national defence planning — an essential foundation for a more integrated and cooperative approach to European defence.

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 2024, 51 new Research & Technology (R&T) projects were under negotiation at EDA, with a total value of €310 million. Combined with the existing portfolio of 68 R&T projects, the overall value of ongoing and planned projects now stands at €681 million.

The European Union still struggles to scale up defence innovation. Despite mounting geopolitical pressures, EU nations are failing to invest in research and development (R&D) at the level necessary to secure the continent's future capabilities.

While funding has increased, the EU's approach to defence innovation is still too fragmented. Investments pale in comparison to investments made by the United States and China, both of which have long recognised that technological superiority is fundamental to military strength. Defence Research & Technology (R&T), which is a subset of R&D covering basic and applied research, as well as technology demonstration, still falls short. Collaboration is crucial to defragment European defence and share the burden of costs of defence research, technology and innovation. So far, European joint R&T projects make up only a fraction of total R&T expenditure, far below the agreed 20% level.

Still, total European collaborative R&T spending is estimated to increase from €359 million in 2023 to more than €600 million in 2026 in current prices, as national and EU funding grows. Despite pressure for short-term results, the mid- to long-term R&D projects are important for future threats.

In 2024, EDA's 15 specialised **Capability Technology Groups** (CapTechs), which are the engine of EDA's defence R&T, witnessed the expansion and evolution of R&T projects in strategic domains, with several new defence R&T projects, as well as by the cross-domain development of the Action Plan for Autonomous Systems. Collaboration in CapTechs, EU-funded defence research, and R&T cooperation between Member States are the strongest drivers of European defence R&T collaboration.

Separately, the **European Defence Innovation Hub (HEDI)** and which is located within EDA, has placed a strong emphasis on experimentation and testing technologies that could disrupt military operations. In 2024, its proof-of-concept efforts focused on integrating artificial intelligence into war gaming for air and missile defence scenarios. A major contract was awarded, with an end-user demonstration scheduled for early 2025.

"The European Defence Innovation Hub is more than an initiative – it is a strategic enabler for Europe's defence innovation ecosystem. By fostering disruptive solutions, enhancing cross-domain collaboration, and driving forward experimentation at scale, we are working to help European armed forces with the innovations they need for future challenges."

Federica Valente
Research, Technology and Innovation Coordinator

"The CapTechs are the core of EDA's R&T network of Member States, researchers from academia and institutes, and the European industrial base. As such, the network is unique in the European Union."

Christian Schleippmann
Head of Technology and Innovation Unit

In addition, since its launch in 2022, **the European Defence Innovation Network** has convened with workshops on defence innovation education and training for senior military personnel.

The **Uptake of Innovation** programme was meanwhile launched in 2024 to accelerate the integration of new technologies into defence systems through real-world operational trials. The first campaign focuses on cross-domain logistics for autonomous systems, an area with significant potential for enhancing military efficiency. Seven industry contracts were awarded to provide test platforms, with strong private sector interest in European defence.

CAPABILITY TECHNOLOGY GROUPS (CAPTECHS)

EDA's CapTechs bring together national experts, industry leaders, 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 projects.

Here are the highlights of 2024:

- **CapTech Aerial Systems (Air)** advanced long-term research in air combat and transport technologies. In 2024, a flight test validated Automatic Air-to-Air Refuelling (AAR) technologies. New projects kicked off, including Remotely Piloted Aircraft System (RPAS) autonomy and initiatives focused on health monitoring systems for electric drones and thrust vectoring for combat unmanned autonomous vehicles (UAVs). Cross-domain collaborations are underway for UAV mothership technologies and ground-based energy sources for drones.

- **CapTech Ground Systems (Land)** facilitates the development of future land capabilities. During 2024, it launched projects to enhance protection for autonomous systems, integrate fuel cell technology for military use, and improve IED detection. Future projects will explore 3D terrain modelling, exoskeletons for soldiers, and unmanned combat engineering systems. Several initiatives on camouflage, hybrid drive trains, and automatic target recognition are nearing completion.

- **CapTech Naval Systems (Maritime)** develops and improves naval technologies for European navies, including manned and unmanned platforms as well as the integration of different weapon, energy and other systems, and sensors. In 2024, it continued its work on autonomous underwater vehicles and next-generation minesweeping technology. Several projects are in the pipeline, including studies on advanced materials for acoustic signature management and hybrid multifunctional metamaterials for defence applications.

- **CapTech Missiles and Munitions** kicked off two new projects in 2024 on next-generation small arms ammunition and energetic materials education. Future efforts will focus on AI applications in missile and munitions technologies and reactive materials for advanced warheads.

- **CapTech Electro Optical Sensors Technologies** develops R&T activities on electro-optical passive and active sensors and image processing and enhancement, specifically to improve ISTAR. In 2024, it successfully completed the DVE-DELETE project, which developed AI-powered image processing algorithms to enhance visibility in degraded environments. The CapTech currently runs several projects, with Hyper-IP (hyperspectral imaging and processing) expected to launch by the end of 2024.

- **CapTech Communication Information Systems and Networks** progressed in developing resilient military communication systems. Projects in 2024 focused on AI-hardened radar and communication systems, long-range communications, and quantum-based networking. A study on sixth-generation (6G) technology for defence is underway.

- **CapTech Cyber Research & Technology** expanded research in 2024 on cyber resilience, including ongoing projects on electromagnetic resilience and autonomous system protection. Additional projects on data-centric security and zero-trust architectures are planned.

- **CapTech Energy & Environment** focuses on energy resilience and sustainable defence operations, including climate change-related challenges. In 2024, it prepared the launch of the €1.2 million E+ZERO project for 2025, developing rapidly deployable, energy-efficient, zero-emission military buildings for smart, independent operations.

- **CapTech Space** launched the Autonomous Space-Based Situational Awareness & AI (ASSAI) project. In 2024, initiatives focus on AI-enhanced satellite imagery analysis and deployable military crisis satellite constellations. A multinational Low Earth Orbit (LEO) to Very Low Earth Orbit (VLEO) satellite demonstration in orbit is also in development.

- **CapTech Guidance, Navigation & Control** launched two new projects: NAVISAR, which focuses on navigation using synthetic aperture radars, and MODE-N, an alternative terrestrial-based Position, Navigation, and Timing (PNT) solution for military applications. Additionally, the first EDA conference on swarming technologies took place, leading to follow-up studies. Three more projects worth approximately €10 million are in preparation.

- **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 to potential critical dependencies. In 2024, it completed the SPICE project, which improved RF front-end performance using Gallium Nitride (GaN) technology. Three new projects are in development, focusing on thermal management (PACKOOL2) and GaN-based components for defence RF systems (GRANITE and pSPICE).

- **CapTech Radio Frequency (RF) Sensors Technologies** seeks to improve Intelligence, Surveillance, Target Acquisition, and Reconnaissance (ISTAR) capabilities. In 2024, it advanced research on military radar and RF systems. Two ongoing projects focus on RF exposure guidelines and smart electronic protection measures.

- **CapTech Materials and Structures** develops technologies and enablers for capabilities requiring advanced lightweight materials. In 2024, it saw the successful conclusion of projects on advanced stealth materials (ALOCAS) and naval propulsion. Follow-up initiatives, including advanced low observable coatings (ALOMAC) and next-generation propellers (NEXTPROP II), are now in preparation. The long-term ICARO programme, signed by 16 Member States, launched three strategic research clusters in 2024, boosting innovation in land and cross-cutting defence materials. The HiMMODA project delivered the first proof-of-concept for metamaterials with multifunctional electromagnetic properties, which will be further developed.

- **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. In 2024, it continued to enhance European defence capabilities for operating in CBRN-contaminated environments. Ongoing projects focus on improving bio-threat identification and tracking. In the human factors domain, two projects support the screening of military personnel for critical competencies and improving operational capabilities in Arctic conditions. Two strategic studies were also launched, assessing the impact of emerging technologies on decontamination operations and updating the CBRN Strategic Research Agenda.

- **CapTech Simulation Technologies** prepared projects in 2024 on rapid prototyping of stealth drones, digital twinning for UAVs, and AI-powered simulations to enhance the security of marine infrastructure.

EU-FUNDED DEFENCE RESEARCH

The **European Defence Fund** (EDF), which co-finances multinational defence projects using money from the EU's long-term budget, has had an effective and noticeable impact on European R&D and R&T. The European Commission entrusts EDF projects to EDA.

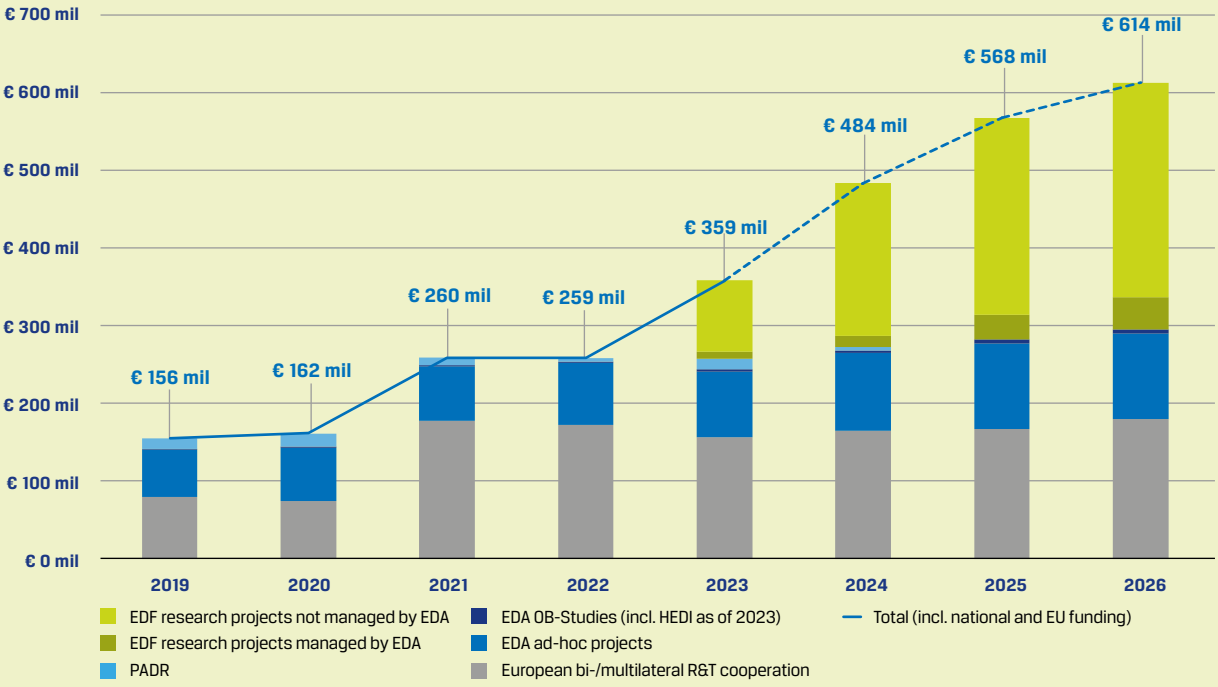
Under EDF 2021, 2022 and 2023, EDA has been entrusted by the European Commission with 24 EDF projects across different categories. The projects entrusted to the Agency in the 2024 contribution agreement belong to three categories dedicated to defence innovation. These are:

1. Medium-scale R&D call for small and medium-sized enterprises (SMEs) targeting research and development projects.
2. Research grants for disruptive technologies with high-risk innovations that could significantly strengthen the potential of the European Defence Technological and Industrial Base (EDTIB).
3. Call dedicated to the **EU Defence Innovation Scheme** (EUDIS) to advance defence-related technologies through cross-border defence innovation networks. The rationale behind the entrustment of innovation-focused projects considers the Agency's potential to drive innovation and to engage with non-traditional players in defence, such as SMEs and mid-caps, through different EDA fora such as HEDI and the CapTechs.

In 2025 EDA is expected to take on more projects from the 2024 call, and in the coming years.

European Collaborative Defence R&T by Funding Source

Figures are in current prices



2023 marked the first year EDF has had a **highly visible impact**

Data regarding EDF consider only Research Actions and follows the following methodology: The graph shows an estimate of the annualised impact of the EDF financial support. Data are based only on the EU financial contribution (i.e. they do not include potential co-funding that may be required for Development Actions): data for EDF2021, EDF2022 and EDF2023 are extrapolated from the descriptive factsheets publicly available on the European Commission's website for each project while, for EDF2024, data are based on the Work Programme. For simplification reasons, the annual distribution of the EDF financial support has been calculated by dividing each project's EU financial contribution by the project duration, expressed in years. This distribution does not consider the usual pre-financing of 55% taking place at the signature of the EDF grant agreements. For PADR, the actual expense per year is used. EDA Ad Hoc projects include only R&T projects and expenses are annualised.

"We are pleased to record a growing portfolio of indirectly-managed EDF projects, thanks to our expertise and good cooperation with the European Commission. A long-term agreement on the EDF is envisaged soon, which will consolidate the cooperation between EDA and the Commission, allowing us to spend more time on projects and less on administrative procedures."

Cristina Di Prima
Project Officer EU-funded Defence Actions

ARTIFICIAL INTELLIGENCE AND AUTONOMOUS SYSTEMS

In 2024, EDA continued its work on **military robotics, AI, and autonomous systems**. Member States tasked the EDA to develop an action plan on autonomous systems, which was approved in January 2024. The plan covers land, air, and sea operations and aims to enhance autonomous systems' capabilities, such as sensing, decision-making, and coordination for tasks like swarming.

EDA also advanced its AI Action Plan, approved in 2020, focusing on areas such as AI taxonomy, EU-wide Data Space, Trusted AI, and AI standardisation in defence. A dedicated working group of 70 experts analysed trustworthiness and standardisation, with their findings published in the Trustworthiness for AI in Defence White Paper at the end of 2024. This document will shape the next steps for the AI Action Plan 2.0.

EDA DEFENCE INNOVATION PRIZE 2024

First awarded in 2018, the EDA Defence Innovation Prize includes €30,000 in funding for each winner to advance their innovations. Winners gain access to the EDA's network of experts and present their work to the agency's Capability Technology Groups (CapTechs), potentially leading to broader implementation in European defence initiatives.

The prize for 2024 focused on two areas: Critical Maritime Infrastructure Protection, and Cognitive Sensing for Enhanced Intelligence, Surveillance, Target Acquisition, and Reconnaissance (ISTAR) Systems.

In the **Critical Maritime Infrastructure Protection** category, Greece-based FEAC Engineering was recognised for its system designed to improve the monitoring and protection of maritime infrastructure. Their proprietary PITHIA Platform generates real-time, high-fidelity digital models of maritime assets, such as harbour installations, pipelines, and offshore wind turbines, for predictive maintenance and threat detection.

In the **Cognitive Sensing for Enhanced ISTAR Systems** category, French company TRAAK was awarded for its PIXYS 3D system. PIXYS 3D addresses challenges in battlefield navigation and Blue Force Tracking by providing precise positioning in complex environments, such as urban and underground areas. Based on patented European technology, this system offers rapid deployment with metric-level accuracy, enabling real-time navigation and enhancing operational awareness in environments where traditional systems fail.

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 2024, EDA supported 36 capability development projects with a total value of €186 million and paved the way for more impactful short- to long-term collaborative opportunities including integrated air and missile defence, loitering munitions, electronic warfare and a new European combat vessel (ECV).

PREPARING PROJECTS

As part of its work to better serve Member States' needs, the Agency has restructured its approach to capability planning and development. The resulting 22 new expert communities comprising over 1,000 planners and experts from Member States are responsible for operating recently-developed capability roadmaps, ensuring the alignment of Member States' needs and plans, which then evolve into cooperative programmes and projects.

Capability development extends beyond equipment, technology and systems. It also includes the training and education of personnel, operational procedures, logistics, maintenance, and infrastructure. Harmonised requirements form the basis of a business case, outlining high-level options for collaborative ways forward. As a starting point, the Agency informs discussions with conceptual papers that define the military problems at hand and describe challenges and gaps, before solutions are identified. In 2024, such papers were produced on **integrated air and missile defence, loitering munitions, armoured vehicles, and soldier systems**.

ADVANCING COLLABORATIVE DEFENCE PROJECTS

Through the CARD process and the work of Agency-led expert groups, several collaborative opportunities were identified in 2024. These received high-level political endorsement, with Ministers of Defence signing letters of intent covering four critical areas:

1. **Integrated air and missile defence:** Strengthening the EU's ability to protect its citizens and territory. Projects range from the short-term procurement of ground-based air defence systems, radars, and countering drones, to medium-term upgrades, as well as research and development for countering-swarms of drones and high-velocity threats;

2. **Loitering munitions:** Allowing EU armed forces to have the capabilities and readiness needed for modern warfare. Envisaged activities include aggregation of demand towards joint procurement in the short term, while at the same time preparing the future EU loitering munitions landscape, including harmonisation of requirements, development, operational experimentations, education and training, and also the related legal and humanitarian challenges;

3. **European Combat Vessel (ECV):** Enhancing the EU's naval capabilities to address maritime threats and protect trade routes to ensure the uninterrupted flow of goods to and from EU territory. This programme aims to develop a common class of European combat vessels by 2040;

4. **Electronic warfare:** Enhancing the protection of EU forces and infrastructure while ensuring operational dominance in the electromagnetic spectrum. The programme includes short-term procurement of existing EU electronic warfare systems, training, and the integration of emerging technologies in the medium term, as well as the long-term development of future EU capabilities.

"Integrated air and missile defence is a complex and multifaceted issue that is fundamental to any successful defence strategy, as it aims to protect our people and territories. As we recognise the urgency of addressing capability gaps, there is a greater need than ever for a coherent EU approach that is fully in sync with NATO."

Isaac Diakite
Project Officer Air Superiority

"The European Combat Vessel is an ambitious programme aimed at developing a common class of European combat vessels by 2040. It will enhance the capabilities of EU navies to address modern threats across all domains and ensure the unhindered and uninterrupted flow of goods to and from EU territory."

Spyridon Mazarakis
Project Officer Maritime Surface Capabilities

SUPPORTING PROJECT MANAGEMENT

EDA supports Member States in harmonising their requirements and maturing collaborative projects, and they can choose to manage capability development through the Agency's framework. In 2024, EDA supported capability development activities, including nine 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 Europe'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 Europe'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 Europe's ability to move large military equipment.

In 2024, the Agency, which is part of the PESCO Secretariat, took part in the PESCO Strategic Review to shape the second phase (2026-2030). For more details on PESCO, see below.

STRENGTHENING LAND FORCES

In 2024, collaborative capability development for land forces focused on countering improvised explosive devices (C-IED) and the recovery of personnel from the battlefield. C-IED capabilities are essential not only for defence but also for civilian security, given the evolving nature of improvised threats, particularly in light of lessons from the war in Ukraine. Across three EDA projects, more than 20 multinational training courses were conducted to improve Member States' capabilities.

Meanwhile, the **Joint Deployable Exploitation and Analysis Laboratory** (JDEAL) celebrated 10 years of training personnel in counter-IED techniques in 2024. First conceived during multinational land operations in Afghanistan, JDEAL has trained over 900 specialists from 14 Member States.

Two major multinational exercises were held:

European Guardian 2024, under the European Centre for Manual Neutralisation Capabilities (ECMAN) project, where 14 operators from across Europe refined their skills in neutralising explosive devices;

Siege Engine 2024, within the Military Search Capacity Building (MSCB) project, where 150 military personnel from Belgium, Cyprus, Ireland, and Sweden improved their ability to conduct military searches for improvised threats.

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 was extended to 2028, with more Member States joining. A new Tactical Personnel Recovery Mission Simulator (TPRMS), developed under EDA, will provide a cost-effective solution for mission training in Italy. At the same time, significant progress has been made in strengthening cooperation among Member States towards concrete initiatives in Ground Combat Capabilities, Future Soldier Systems, and Land-Based Precision Engagement.

ENHANCING NAVAL CAPABILITIES

EDA's maritime projects cover a wide spectrum, from surveillance and critical infrastructure protection to underwater operations and naval combat. Ensuring the security of EU waters through the long-standing **MARSUR** Networking initiative, which was further expanded in 2024, is part of EDA's work.

Furthermore, the next-generation MARSUR systems in 2024 introduced state-of-the-art technologies, including the possibility to exchange classified information up to EU RESTRICTED level. MARSUR was successfully connected to the EU Common Information Sharing Environment (CISE), improving real-time information exchange between the military and civilians.

The **EU Community of Diving Experts** (EU CODE) advanced standardisation efforts in diving medicine and mine countermeasures. With EDA's support, the first EU Harbour Protection Exercise-Seminar was conducted, involving 78 divers from 10 Member States and a Ukrainian diving team.

EDA co-organised the Robotic Experimentation and Prototyping Maritime Unmanned Systems **(REPMUS)** exercise, which took place from 9 to 27 September 2024, alongside Portugal and NATO. At the event, the Agency hosted a **High-Level Symposium on Maritime Infrastructure Security** and led experimentation exercises on unmanned surface vehicles and maritime safety regulations.

EDA supported the **4E** PESCO project, which aims to develop the core systems for next generation European warships to ensure EU power at sea. It will develop 13 major systems to later integrate them into a modern and versatile platform such as the European combat vessels.

The PESCO project **ATT** will bring the current demonstrator to a fully developed system ready for use by EU navies. That is a unique EU solution that will reduce the vulnerability of naval ships against modern "smart" torpedoes.

"In 2024, EDA helped finalise the common requirements for the SATOC project, marking an important milestone for future strategic airlift in Europe."

Michael Sylla
Project Officer Air Transport

STRENGTHENING AIR DEFENCE

EDA took a leading role in supporting European cooperation on integrated air and missile defence in 2024. The Agency produced a concept paper, which led to the letters of intent signed by 18 Ministers of Defence.

The Agency also provided support for **PESCO** projects involving tactical air transport, outsized cargo aircraft, and next generation helicopters. These are:

Strategic Air Transport Outsized Cargo (SATOC): Harmonised requirements were finalised, leading to a feasibility study;

Future Medium-Size Tactical Cargo (FMTC): A cooperative analysis of European solutions for multi-mission operations was supported by the Agency;

Next Generation Medium Helicopter (NGMH): Military needs both for the upgrade of existing fleets and for future capabilities of rotorcraft were assessed and harmonised;

Next Generation Small RPAS (NGSR): Support to ensure alignment with European Defence Fund (EDF) studies.

SATELLITE COMMUNICATIONS (SATCOM)

Currently EDA's largest project, the Agency's SatCom Market project helps provide commercially available satellite communications and communications and information systems (CIS). Its customer base includes national defence ministries, as well as EU civilian, training and military missions, and the EU's strategic headquarters in Brussels. EDA, in support of its Member States, has become one of the largest satellite customers in Europe thanks to this project, built up gradually since 2009. And appetite is still growing. After processing orders under the previous four-year contract, which had a ceiling of €77.5 million, a new contract was set up in early 2024 and runs until 2028, allowing a higher ceiling of €250 million.

SPACE-BASED EARTH OBSERVATION

Space-based Earth Observation (SBEO) plays a crucial role in both military operations and civilian safety. In 2024, EDA contributed to the European Commission's Earth Observation Governmental Service (EOGS) project and supported the Space based Persistent ISR for Defence and Europe Reinforcement (SPIDER) project, which focuses on space-based persistent Intelligence, Surveillance, and Reconnaissance (ISR) under the EDF These initiatives help improve Europe's ability to monitor and respond to security challenges using advanced satellite technology.

STRENGTHENING CYBER DEFENCE – A VITAL DOMAIN

In 2024, EDA launched a major new 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), with a large conference advancing its operational and tactical efforts. Additionally, the Agency expanded the scope and duration of its project on Cooperation in Cyber Ranges, ensuring Member States can better prepare for evolving cyber threats.

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 2024, EDA continued to improve cross-border movement procedures across land, air, and sea. A new technical arrangement for maritime transport is under development, complementing existing agreements for surface and air transport.

To streamline customs processes, EDA is assessing the use of electronic data processing to facilitate information exchange between armed forces and customs authorities. This work aligns with the Secure Digital Military Mobility System project under the EDF and involves close cooperation with NATO and the European Commission (DG TAXUD, DG MOVE and DG DEFIS).

SUSTAINABLE AND AGILE LOGISTICS

Efficient logistics are essential for military readiness. In 2024, **additive manufacturing** was a key focus area. EDA launched the Additive Manufacturing for Logistic Support (AMLS) project to establish common standards and improve spare parts interchangeability among Member States. The Agency also hosted the AM Village workshop, bringing together over 360 military, industry, and academic experts from 19 countries to accelerate developments in this field. Ukraine has shown strong interest in additive manufacturing, and under the existing Administrative Arrangement, EDA is actively involving the country in all related activities.

Other logistics developments in 2024 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 2024, EDA managed two major projects funded by the European Commission under the EDIDP and EDF programmes:

- **European Command and Control** (EC2): 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.
- **European Cyber Situational Awareness Platform** (ECYSAP): Aiming to develop a real-time cyber operational picture, this platform will help detect, prevent, and respond to cyber threats.

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 2024, EDA extended the CBRN Surveillance as a System (CBRN SaaS) project, which is linked to a PESCO initiative, by an additional four years. This extension will support the transition from initial development and testing to achieving full operational capability. The project aims to establish a persistent, distributed sensor network that generates a recognised CBRN picture in real time.

Additionally, the Agency began developing 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.

AIRWORTHINESS

EDA has been pivotal in standardising military aircraft certification through the European Military Airworthiness Requirements (EMARs), which are now adopted by more EU Member States, third countries, and NATO. This has made EMARs the global standard for military airworthiness, fostering greater collaboration between National Military Airworthiness Authorities (NMAAs). The Military Airworthiness Authorities (MAWA) Forum, supported by EDA's Airworthiness Office, has updated the EMARs and related documents, finalising nine in 2024. The Forum also began exploring airworthiness adaptations for crises or wartime. Additionally, EDA's European Military Airworthiness Platform for Safety Information Exchange (EMAPSIX) completed its pilot phase, offering NMAAs a platform to share airworthiness directives and plan future steps.

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, the European Commission 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 2024, EDA continued its €140 million framework contract signed in 2023, which is due to run for up to four years.

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 2024, EDA, alongside the EU Military Staff (EUMS), redefined its T&E strategy for 2025-2035. Meanwhile, the Defence Test and Evaluation Base (DTEB) has supported the Hub for EU Defence Innovation (HEDI) in testing autonomous systems for cross-domain logistics, set to be implemented in 2025 as part of broader efforts to modernise European defence. In addition, the 4th Test and Evaluation Community Days Conference in 2024 brought together over 100 participants from across the defence community.

BUYING TOGETHER

CORE TASK FOUR: Facilitating joint procurement, enabling Member States to address capability gaps efficiently and cost-effectively.

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, harmonise their requirements 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.

In 2024, EU Member States reaffirmed EDA's role in aggregating demand, ensuring that shared priorities are identified early and translated into projects that can lead to joint procurement. This approach reduces market fragmentation, improves interoperability, and strengthens Europe's defence industry.

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 AS A PROCUREMENT AGENT

Member States may choose to jointly procure defence products off the shelf from the EDTIB through EDA's framework. In 2024, EDA 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.

AGGREGATION OF DEMAND IN ACTION

The process of aggregating demand for ammunition, CBRN equipment, and soldier equipment began in 2024 and will continue into 2025, now also incorporating loitering munitions. This process will significantly assist Member States and EDA in identifying and prioritising potential areas for joint procurement. By leveraging economies of scale, it reduces administrative burdens on Ministries of Defence and strengthens the EDTIB.

Soldier Equipment

Ensuring that European soldiers are equipped with high-quality personal protective gear is a shared priority among EU armed forces. To achieve this EDA worked with participating Member States to harmonise requirements and aggregate demand for helmets and body armour.

Once demand is consolidated, Member States can select the most suitable procurement framework for joint acquisition.

CBRN Equipment

With increasing threats in modern conflicts, individual protective equipment against CBRN hazards is crucial. In response, EDA and participating Member States aggregated demand for CBRN masks, filters and protective suits.

Aggregating demand enhances supply security, ensures cost efficiency, and guarantees that European forces are equipped with standardised, high-quality protective gear.

"Aggregating Member States' demands is in our DNA. But the urgency of their needs has led us to adapt our approach. In the case of 155mm ammunition, we had to meet Ukraine's needs while ensuring coordination and compatibility with other EU frameworks. We have built on lessons learned and are now better prepared to address future demands."

Oisín Moore
Project Officer Ammunition

AMMUNITION

EDA's ammunition procurement efforts in 2024 focused on:

- 155mm artillery ammunition and 84mm Carl Gustaf anti-tank ammunition

  The 155mm artillery ammunition project, which was launched in 2023, includes a so-called fast-track initiative that was designed to ensure a rapid delivery of ammunition to Member States in the context of the support to Ukraine, in sync with relevant EU funding instruments. EDA signed 60 framework contracts with European manufacturers for the supply of 155mm artillery ammunition, covering both complete rounds, known as All-Up Rounds (AURs), and individual elements thereof, such as fuses, projectiles, modular charge systems, and primers. Respective AURs and elements are compatible with four different European-made howitzers *(France's Caesar, Poland's Krab, Germany's Panzerhaubitze 2000 and Slovakia's Zuzana)* which are amongst the artillery platforms used by Member States and the Ukrainian armed forces.

  Nine Member States have so far ordered through EDA. The first deliveries of 155mm artillery ammunition and elements began in May 2024, with additional deliveries continuing into 2025. The combined maximum value of the framework contracts available to Member States is €1.6 billion.

  The next priority is the procurement of 84mm Carl Gustaf anti-tank ammunition. The procurement procedure for a five-year contract was launched in December 2024. Orders are expected in 2025.

"EDA secured contracts with European industry in record time for the urgent supply of 155mm ammunition. The Agency's approach allowed for flexibility in responding to the Member States' needs, so purchases ranged from components to complete rounds."

Simone Gariglio
Procurement and Contract Officer

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.

"Over the last three years it has become more evident than ever that a strong European defence industry is critical for our security. EDA's industry engagement should improve European defence companies' ability to support EU capability development."

Carl-Johan Lind
Policy Officer Industry Engagement and EU Policies

As geopolitics shift rapidly, European Union armed forces are modernising. The European Defence Agency (EDA) is at the service of Member States, speaking on their behalf as plans, policies, and programmes are forged at the EU level. Acting as a link between national Ministries of Defence and EU institutions, the EDA ensures that military needs are considered in decisions shaping Europe's security future.

In March 2024, the EU released the European Defence Industrial Strategy (EDIS), a roadmap to making Europe's defence industry more responsive and resilient. EDA played an active role in shaping the strategy and is now working closely with the European Commission and the European External Action Service (EEAS) to implement its actions.

EDA ADVISES EIB ON DUAL-USE PROJECTS

In October 2024, EDA and the European Investment Bank (EIB) updated their partnership agreement. The revised agreement gives EDA a prominent role in advising the EIB on projects that serve both civilian and military purposes. In May 2024, the EIB broadened its mandate to support dual-use projects, allowing financing for technologies with both civilian and military applications. The EIB has dedicated €8 billion for security and defence-related initiatives, supported by its Security and Defence Office. EDA will help improve project assessments, financing ideas, and funding access.

COOPERATIVE FINANCIAL MECHANISM (CFM)

The Cooperative Financial Mechanism (CFM) is a new 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. First proposed in 2018, it gained full political approval in July 2024 and is now operational. 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.

MILITARY DRONES IN SHARED AIRSPACE

In aviation, the Single European Sky initiative aims to improve coordination between military and civilian air traffic management. In 2024, EDA worked towards ensuring the safe flight of remotely piloted aircraft systems (RPAS) in civilian airspace. One of EDA's goals, along with the European Union Aviation Safety Agency (EASA), is to enable the full integration of large RPAS into general air traffic airspace. By testing, evaluating, and refining the procedures, the project is helping to bridge the gap between 'accommodation' or 'mitigation' measures and full integration. EDA, working closely with EASA and EUROCONTROL, as well as national aviation authorities, is laying the foundation for a more secure and efficient airspace across Europe.

SUSTAINABILITY IN DEFENCE: GREEN ENERGY AND CIRCULAR ECONOMY

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 third phase of the programme concluded in April 2024, having generated over 30 energy-related project ideas and 15 research studies. In October 2024, the forum entered its fourth phase (2024-2028). EDA and the European Commission signed a grant agreement in December at the Directorate-General for Energy. Managed by EDA and funded under the LIFE Clean Energy Transition sub-programme, CF SEDSS is Europe's largest defence energy community. With the global defence sector responsible for up to 5.5% of worldwide CO2 emissions, the fourth phase will continue supporting defence ministries in enhancing energy efficiency, integrating renewables, and strengthening energy security. Over the next four years, the initiative will focus on knowledge sharing, collaborative projects, studies, and policy roadmaps to address emerging energy challenges. It will also organise 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.

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.

"Strengthening defence through energy sustainability is critical. By advancing energy efficiency, resilience and security, Europe's defence sector is enhancing its operational effectiveness, while paving the way for a net-zero future."

Maja Kuzel
Project Officer Energy

WORKING WITH THE WIDER DEFENCE COMMUNITY

"In today's environment, we have no option but to cooperate. To best support Member States in developing the capabilities they need requires us to work very closely with NATO. Cooperation with third parties has continued with varying degrees of depth, based on mutual interests and added value."

Maxime Roclore
Policy Officer, Chief Executive's Policy Office

With full-scale war in Ukraine, it is clear that having strong capabilities, enough supplies, and a capable industry is crucial for Member States' security. This requires our Union to work closely with others. Defence innovation is just as important to tackle the threats of tomorrow, and it is something we need to tackle together with our partners.

RELATIONS WITH THIRD PARTIES

In 2024, the Agency further developed its relations with the countries with whom it has concluded an Administrative Arrangement (AA). EDA has deepened its cooperation with Norway, Switzerland, Ukraine, and the United States, as well as with the European Space Agency (ESA) and OCCAR. In the context of the third Joint Declaration on EU-NATO Cooperation, the cooperation between EDA and NATO continued to deepen across all aspects of defence planning and capability development, readiness, innovation and on projects such as Military Mobility.

ADMINISTRATIVE ARRANGEMENT (AA) COUNTRIES

EDA has formal participation with five AA countries that allow for structured cooperation:

Norway remained the most involved country, after 18 years, with cooperation extending to all four areas with over 30 work strands where they are associated. Research & Technology (R&T) is the area where cooperation is the deepest.

Cooperation with **Switzerland** continued with a renewed interest of the Swiss Ministry of Defence (MoD) for cooperation since Russia's unjustified invasion of Ukraine. The cooperation with Switzerland is primarily focused on R&T and innovation, notably in light of Switzerland's joining of the Hub for European Defence Innovation (HEDI). Cooperation continues to develop in other areas, especially capability development.

The scope of cooperation with **Serbia** remains limited, in particular due to the national decision in 2022 to suspend participation in multinational exercises. Serbia remains involved in the Consultation Forum on Sustainable Energy in the Defence and Security Sector (CF SEDSS).

In 2024, work with **Ukraine** focused on the sharing of lessons learned from the war, and the involvement of the Ukrainian Ministry of Defence in specific activities, such as the Additive Manufacturing Village in May 2024, participation in technical workshops with Member States, and EDA conferences, notably related to the use of drones. The Agency remains fully committed to contributing to the EU's coordinated efforts in support of Ukraine, notably by facilitating the joint procurement of 155mm ammunition.

The Administrative Arrangement with the **United States Department of Defense** was signed in April 2023, and cooperation developed across all work strands in 2024, from dedicated dialogue to specific activities, namely consultations on the impact of EU REACH regulation, Military Mobility, supply chain issues, and the impact of climate change on defence.

ADMINISTRATIVE ARRANGEMENT (AA) ORGANISATIONS

EDA's cooperation with the **European Space Agency** (ESA), based on the Administrative Arrangement concluded in 2011, focused on the implementation of the ongoing projects on GOVSATCOM/Secure SatCom, Cyber Defence for Space, Earth Observation (EO), Unmanned Maritime Systems (UMS), CBRNE, and Guidance, Navigation, and Control (GNC).

Bilateral cooperation with the **Organisation for Joint Armament Cooperation** (OCCAR) in the framework of the Administrative Arrangement of 2012 continued. Regular information exchange on respective activities continues to take place, with EDA supporting in particular the second phase of the OCCAR European MALE RPAS programme. Following EDA's 2024 Long-Term Review, cooperation between EDA and OCCAR is likely to develop further. In December 2024, EDA, OCCAR and the NATO Support and Procurement Agency (NSPA) met in Brussels for a trilateral discussion focused on strengthening their collaboration in support of both European and transatlantic security.

NATO

EDA's cooperation with **NATO** remains a pillar of European defence, ensuring alignment between EU and NATO defence planning processes, as well as capability development efforts. In 2024, this partnership continued to drive progress in critical areas such as Military Mobility, cyber, hybrid warfare, air-to-air refuelling, military aviation, airworthiness, and standardisation, as highlighted in the ninth EU-NATO progress report of June 2024.

Guided by the EU-NATO Joint Declarations and related common actions, the collaboration is built on shared principles and a commitment to delivering results. Throughout the year, NATO and EDA maintained a steady exchange, with reciprocal participation in key meetings. Regular cross-briefings kept the EDA Steering Board and NATO's Conference of National Armaments Directors aligned, with a strong focus on ramping up defence industry production, supporting Ukraine, and replenishing national stockpiles.

EDA's Chief Executive held frequent discussions with NATO Assistant Secretaries General to reinforce cooperation at the highest levels.

MCDC

Additionally, EDA, alongside the EU Military Staff (EUMS), actively participated in eight 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. A MCDC report published in December 2024 recommends a prioritised listing of command and control (C2) modernisation actions.

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 activities. As noted earlier, cooperation between EDA and SESAR Deployment Manager, as well as with the EIB group, has been notably reinforced in 2024.

FACTS AND FIGURES

DEFENCE DATA

In conjunction with the Coordinated Annual Review on Defence (CARD), EDA published its annual defence data report for 2023 and projections for 2024 on 4 December 2024, detailing defence spending by the **EDA's 27 Member States**. In 2023, EU defence spending reached a record €279 billion, marking a 10% increase from the previous year and the ninth consecutive year of growth. Of the 27 EU Member States, 22 increased their defence expenditure, with 11 raising spending by more than 10%. A total of €72 billion, accounting for 26% of overall defence spending, was allocated to defence investments, the highest share recorded since data collection began in 2005. This investment was primarily directed towards procurement of new equipment, which saw a 19% increase compared to 2022.

At the time of publication, EU defence spending was forecasted to have risen further to €326 billion by the end of 2024, with defence investments making up a record 31% of total expenditure. Spending on research and technology (R&T) is expected to have reached €5 billion, while procurement spending could exceed €90 billion.

Note: 2024 figures are provided in 2023 prices.

EDA CELEBRATES 20 YEARS OF PROMOTING DEFENCE COOPERATION

In 2024, EDA celebrated its 20th anniversary. At the May EDA Steering Board in Brussels, Ministers of Defence marked the occasion by approving a new Long-Term Review (LTR), laying out the responsibilities for the Agency and putting a stronger focus on supporting Member States through the full development cycle of military capabilities. EDA now has five core tasks, rising from the three outlined in the previous, 2017 LTR. The formal anniversary was celebrated at EDA's offices in June, before the 12 July 2024 milestone, exactly two decades since the Agency's birth.

NEW HEAD OF AGENCY

In December 2024, Kaja Kallas became EDA's new Head of Agency. An Estonian lawyer, politician and former prime minister of Estonia (2021-2024), she made history as the first woman to serve in this role in her country.

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 the second half of 2026. EDA aims to complete its relocation no later than 30 June 2027.

"Europe has no time to lose. Boosting defence spending is vital, but only through targeted, coordinated investments can we meet the challenges ahead. Stronger EU collaboration means enhanced military capabilities, greater resilience, and strategic autonomy."

Katharina Wolf
Project Officer, Defence Data Analysis

EU CLASSIFIED INFORMATION (EUCI)

In 2024, EDA focused its efforts on the electronic handling of EU classified and sensitive information to improve information security. The need to manage and share classified information with various stakeholders across the EU defence community, as well as with strategic partners such as NATO, is increasing. To address this, EDA is currently redefining its business requirements through engagement with relevant user communities. The review and validation process is expected to be completed by early 2025. Following this, ways to store, process and exchange classified information will be assessed. EDA will then identify options that meet these needs while remaining proportionate to the Agency's scale and budget in terms of total cost of ownership.

In 2024, EDA also informed Member States of its decision to discontinue the EDA-R and EDA-S projects, which had aimed to enable the electronic handling and sharing of classified information up to SECRET UE/EU SECRET and RESTREINT UE/EU RESTRICTED. This decision followed a due diligence review conducted by a trusted third-party provider, which concluded that both systems were unviable.

To ensure business continuity for the CARD/CDP process, EDA has adopted the ETHER II system as an interim solution, enabling the processing of EUCI up to CONFIDENTIEL UE/EU CONFIDENTIAL. EDA has taken note of the shortcomings identified in the two discontinued EUCI projects and will initiate a new EUCI handling capability-building programme. This will result in an ecosystem of EUCI systems and services fully aligned with EDA's operational needs.

INFORMATION SECURITY GOVERNANCE REORGANISATION

Building on lessons learned from EUCI project governance and the findings of the 2023 Security Audit, EDA has restructured its Information Security Governance to improve functional integration and ensure greater clarity and effectiveness in information security management.

A change is the transformation of the Chief Information Security Officer (CISO) role into a Business Information Security Officer (BISO). This marks a shift from a primarily consultative function to a more business-focused role, ensuring closer, hands-on integration with IT, security, and infrastructure services, while maintaining its independent advisory capacity.

ACCESS TO DOCUMENTS

EDA will continue to publish documents on its website under "EDA DOCUMENTS" in order to make them directly available to the public without the need to submit access to document requests and to increase transparency and the availability of information about EDA's activities. If, however, an EDA document has not been published yet, a request for access can be made. Applications shall be made in writing and sent to the Agency by email to accesstodocuments@eda.europa.eu

EDA BUDGET 2024

EDA INITIATES PROJECTS AND SUPPORTS MEMBER STATES ALL THROUGH THE CAPABILITY DEVELOPMENT CYCLE

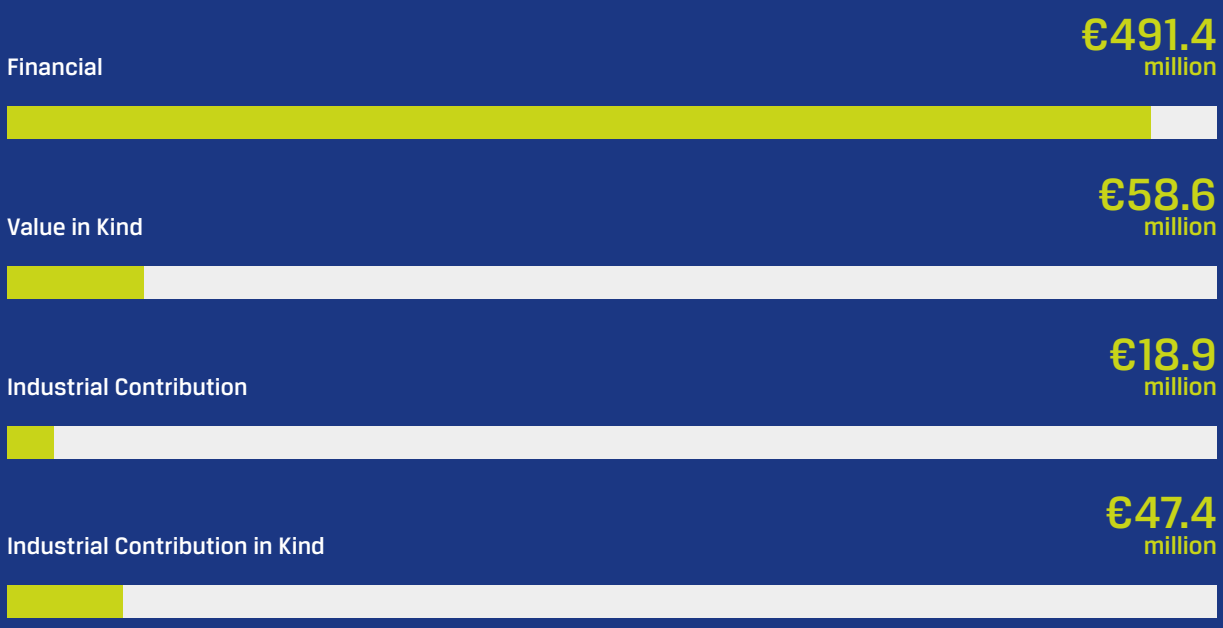
171

Ad hoc projects
43 Capability projects and
128 Research & Technology
(R&T) projects

28

EU-funded projects
(under the European
Defence Fund - EDF)

MEMBER STATES' CONTRIBUTION TO AD HOC CAPABILITY DEVELOPMENT AND R&T PROGRAMMES AND PROJECTS (not including PESCO nor 155mm ammunition procurement) WITH EFFECT END–2024



Total
€562.1 million

SOME OF EDA'S CURRENT PROJECTS

Joint procurement of ammunition (since 2023)
Fast track joint procurement of 155mm ammunition: Nine Member States placed orders for more than € 350 million

Air medical evacuation (since 2019)
Supports EU missions and operations in Africa, as well as national needs in Europe

Provision of satellite communication equipment and services (since 2014)
Supports EU missions and operations, as well as national needs

MARSUR (since 2006)
Maritime surveillance project allowing for information exchange between European navies

LEO2VLEO satellites (2024-2026)
Development of a satellite demonstrator that can manœuvre from Low Earth Orbit (LEO) to Very Low Earth Orbit (VLEO) and back

EDA STAFF

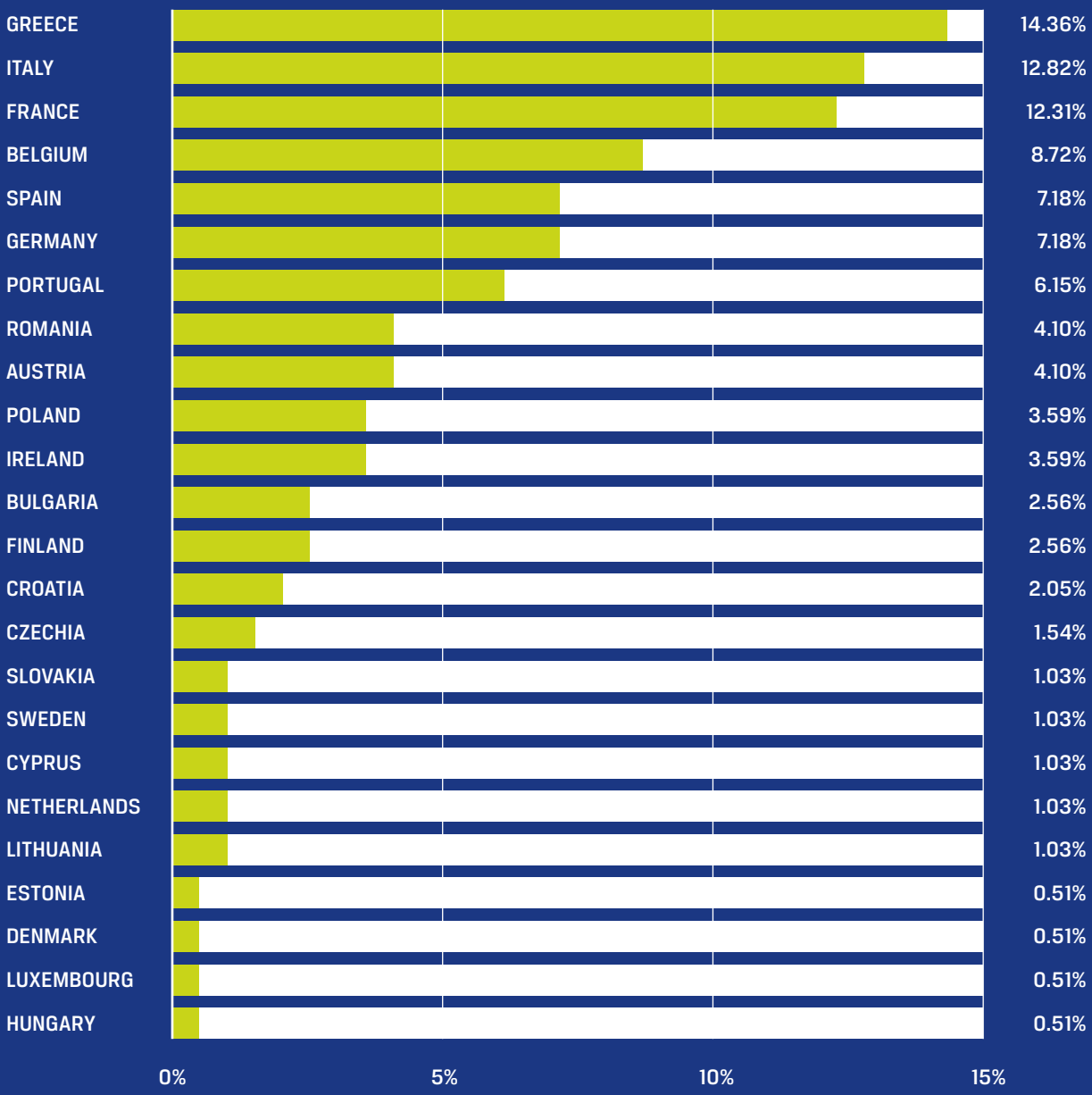
195

(on 31/12/2024)

GENDER DISTRIBUTION

Female 34%
Male 66%

NATIONALITY DISTRIBUTION



EDA MANAGEMENT

SENIOR MANAGEMENT ON 31 DECEMBER 2024

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

Jiří ŠEDIVY
Chief Executive

André DENK
Deputy Chief Executive

Stefano CONT
Director Capability, Armament & Planning (CAP)

Nathalie GUICHARD
Director Research, Technology & Innovation (RTI)

Seán WHITE
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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EUROPEAN DEFENCE AGENCY

20 YEARS PROMOTING EUROPEAN DEFENCE COOPERATION 2004-2024

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