

## **Scoping Paper - Defence Readiness Roadmap 2030**

### **1 – Introduction**

What Europe and its Member States do for the rest of this decade will shape the security of our continent for the rest of this Century. By 2030, Europe needs a sufficiently strong European defence posture to credibly deter its adversaries, as well as respond to any aggressions. **To be “2030 ready”, Europe needs to move now.** This is why the Commission and the High Representative will propose a Defence Readiness Roadmap ahead of the October European Council. The idea will be to instil an urgency mindset by providing clear objectives, milestones and European flagships.

Readiness entails developing and deploying the **capabilities and military readiness that are needed for modern warfare**. It means ensuring it has a defence industrial base that gives it a strategic advantage and is ready to deliver cutting-edge innovation and fast, mass production in the cauldron of war.

The need for speeding up and ramping up of efforts reflects the acute and growing nature of today’s dangers, as well as the **evolving threat landscape** which Europe and its Member States must contend with, adapt to, and prepare for. This starts with Russia’s unprovoked, full-scale military aggression against Ukraine, which is reaching new heights of brutality and violence. Reckless provocations against Member States, from cyber-attacks to violation of air space, are on the rise.

Europe’s readiness must also be informed by the **wider global context**. A new international order is currently being formed in a period of intense interstate competition. **Strategic competition** is increasing in our wider neighbourhood. **New technologies** and transnational challenges place stress upon our political and economic system. Authoritarian states increasingly seek to assert their control across our societies and economies. Traditional allies and partners are also changing their focus towards other regions of the world.

**Europe’s defence posture and capabilities must be ready for the battlefields of tomorrow**, in line with the changing nature of warfare. Technological innovation and iteration – developed at speed and scale – will dictate strength on the battlefield. Those that develop their own technologies will be the strongest and least dependent, notably for the critical systems of modern warfare, such as drones, satellites or unmanned vehicles.

Against this backdrop, **Europe must urgently equip itself with a strategic capacity**, developed and maintained together, capable of responding in real time. It must act as an independent actor and take responsibility for its own defence and security. It must contribute positively to global and transatlantic security, in close partnership with NATO.

This should build on the work already started. **Europe has turned the corner on decades of under-investment**. The implementation of the REARM Europe agenda will mobilise up to 800 billion euro for defence, including through new funding instruments such as SAFE. The spending commitments undertaken by Allies at the June 2025 NATO Summit will also require sustained expenditure in the next decade. It is imperative that this also pays off in terms of jobs, innovation and competitiveness in Europe.

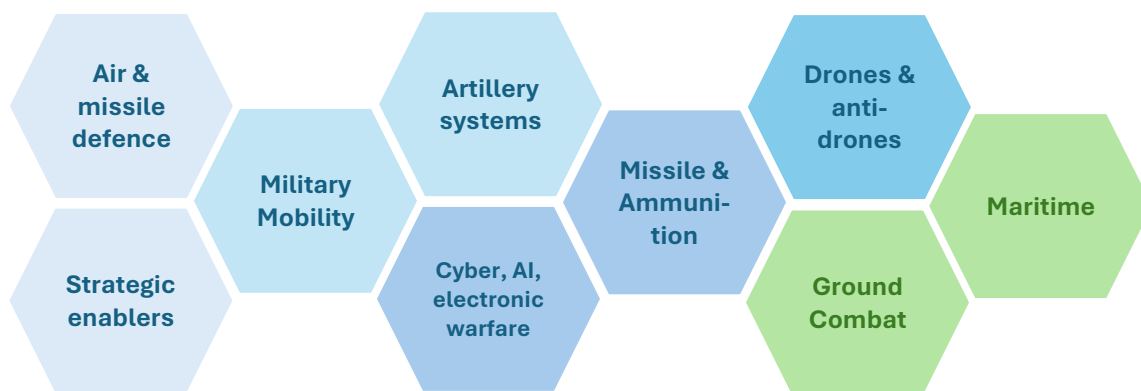
**Member States are and will remain sovereign for their national defence**. At the same time, the complex threat landscape also points to the need for acting together, rather than fragmenting

our efforts across uncoordinated national initiatives. There is therefore a clear need to invest more, invest together and invest European.

This scoping paper aims to inform the discussion amongst Leaders at the informal summit in Copenhagen on 1 October. It provides a snapshot of the structure, objectives and the overall approach for the Roadmap to be presented ahead of the October European Council. Details on individual actions, milestones and indicators will be presented in the Roadmap and do not feature here, in order to focus on the overall approach.

## **2. Closing Europe's capability gaps by 2030: key steps and milestones**

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



### Defining and tracking Member States operational needs

Delivering on the joint objective of readiness by 2030 requires taking a **systemic approach**. Maximum interoperability and complementarity of the military capabilities acquired are essential. The **EU Military Staff** (EUMS) is carrying out an overview of Member States' current capability state-of-play and objectives, which includes the priority capability areas and takes into account NATO targets as well as Ukraine's needs.

The overview will be integrated into the Coordinated Annual Review on Defence prepared by the **European Defence Agency** (EDA) and updated yearly. This will ensure the link between the analysis of military capability shortfalls and the priority capability areas. **Chiefs of Defence Staffs** will regularly review in a classified setting the outcome of the analysis to inform further work by National Armaments Directors and Capability Directors on proposed solutions. It is therefore key that Member States continue to share aggregate information on their objectives and progress towards them with the EUMS. While classified, this information will allow effective monitoring of the collective progress along the Readiness 2030 Roadmap.

Building on this process, the Commission and the High Representative will present an **Annual Defence Readiness Report** focusing on the EU aggregate dimension. It will cover the different dimensions set out in this Roadmap and update on progress across key indicators. Based on

information provided by Member States, this Report will be presented to the October European Council so that Leaders can review progress and provide strategic guidance on priority actions.

It will feed into a new process designed to look at collective progress towards defence readiness across key indicators and milestones, as well as consistency of defence efforts among Member States.

#### Capability development through Member State coalitions

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

For this, Member States should swiftly complete the ongoing process of forming **Collective Capability Coalitions**. They should detail which Member States will tackle which shortfalls and agree on the effective governance of each coalition, the role of lead and co-lead nations, capability objectives and collaborative projects to be launched to achieve them. Building on existing EDA-led Priority Implementation Roadmaps, each capability coalition should set specific objectives, with timelines to respect. Co-leadership should be encouraged to ensure Member States' ownership and further split work strands. Each coalition may lead one or several European Defence Project of Common Interest (EDPCI) and/or Structures for European Armament Programmes (SEAP) and/or new PESCO projects that would trigger targeted EU support.

To support coalitions' work, the informal **Defence Readiness Task Force** will propose common horizontal guidelines on lead nation's role, relations between co-leaders if needed, membership, plan of action, link with the EU actors and reporting mechanism, relying on existing processes as much as possible. The EDA will play a key role in facilitating the Coalition process, notably through the Capability expert groups. The EUMS work on capability shortfalls will continuously inform this process. The Commission will ensure the link between coalitions and EU funding instruments and policies. Given the urgency, Member States will be invited to report by early 2026 to the Foreign Affairs Council in Defence format.

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

**Increasingly gearing defence investment towards joint procurement** will be a key factor for readiness, as demand aggregation and economies of scale will help ramp up European defence industry production capacity and foster interoperability. Aggregating European demand will also enhance scale effects and support ongoing efforts to collectively secure and ramp-up key production nodes and supply chains. Bilateral agreements are being negotiated to allow the United Kingdom and Canada's defence industries to directly benefit from joint procurement supported by the new SAFE instrument.

### **3 – Launching European Readiness Flagships**

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

It is therefore proposed to launch **a set of initial European Readiness Flagships** that will benefit the security of Europe as a whole, while being mutually reinforcing: **the European Drone Wall**, the **Eastern Flank Watch**, the **Air Defence Shield** and the **Defence Space Shield**.

The flagships will be open to all Member States who want to participate. They will have the potential to become European Defence Projects of Common Interest (EDPCIs) within the EDIP framework, once agreed by the Council. Flagships are of a cross-cutting nature and imply parallel progress in several capability areas and in sectors beyond core defence. Protection of critical infrastructure, border management and internal security will be of particular importance.

**Flagships are pan-European by design and by nature.** As an example, the **Defence Space shield** will ensure the protection and resilience of space assets and services against growing threats, while delivering state of the art information on Positioning, Navigation with **Galileo** as well as real time intelligence and Earth Observation through **IRIS<sup>2</sup>**.

Participating Member States can put forward proposals for flagship projects in addition to the ones described below. They will be drivers of these projects, agreeing on the concrete objectives, task distribution and national budgets funds' allocation and instruments at European level.

By Spring 2026, the Commission and the High Representative will agree with participating Member States and other EU actors, including the European Defence Agency, on the appropriate coordination arrangement. Based on information provided by Member States and other EU actors, each flagship project will be included in the Annual Defence Readiness Report.

***The upcoming Roadmap to be presented to the European Council will outline detailed objectives, milestones and indicators for each of the flagships.***

***In light of the continued military aggression against Ukraine, and the recent increase of violations of air space of Member States, two flagship projects – The European Drone Wall and The Eastern Flank Watch – require special urgency and should be moved forward expeditiously.***

#### **Flagship 1 – the European Drone Wall**

The '**European Drone Wall**' will be designed as a multi-layered, deep zone of technologically advanced systems with interoperable anti-drone capabilities for detection, tracking, and neutralization, as well as capabilities to hit ground targets leveraging drone technology for precision strikes.

This reflects the urgent focus needed on the European defensive line against unmanned aerial vehicles, notably following the recent increase of EU air space violations. **The European Drone Wall** should build on the experiences from Ukraine, where a core lesson is the need to establish **innovative drone and counter-drone ecosystems** relying on scalable production capacity and continuous technological development. This requires a network approach, where start-ups, academia, established defence industries and governments work closely together, facilitated by a simple financial support structure.

The Drone Wall should also be adaptable and interoperable to help **deal collectively** with other threats, such as responding to natural disasters, irregular migration or transnational organised crime, including with **different operative hubs across Europe** working in an integrated manner.

### Flagship 2 – The Eastern Flank Watch

The **Eastern Flank Watch** aims to build up **EU frontline States capacity to face** a spectrum of threats ranging from hybrid operations to drone incursions, Russia's shadow fleet and the risk of armed aggression. It aims to fortify the Eastern borders as regards land, air and sea threats, contributing to the security of the whole Union. This will be fully complementary with NATO's Eastern Sentry, Baltic Air Policing and the Forward Presence forces.

The Eastern Flank Watch will build on **four elements**: **ground defence** (fortification and anti-mobility systems including ground combat capabilities), **detection and anti-drone/air defence** (drone wall), **maritime security** in the Baltic and Black Seas, and **situational awareness** (including space-based).

It would be financed from different sources, both **national** and **EU**, including defence industrial programmes, dual-use programmes such as border control, economic assistance to regions affected by insecurity or Cohesion policy instruments.

#### 4 – The defence industrial dimension

A strong, resilient and technologically **innovative industrial base**, with its **roots within the EU**, is a key component of Europe's deterrence and security. The drive towards closing capability gaps must be seen as an opportunity for EU defence industry to increase its competitiveness and embrace innovation, positioning itself at the technological frontier and boosting its export potential. This must benefit all companies in the supply chain, notably start-ups, scale-ups and SMEs.

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

To support this, the EU should **update its competition and State aid frameworks**, notably to help foster greater defence industrial cooperation between Member States. This includes reflecting on the need to enable direct investment in strategic defence industries, without hindering competitiveness.

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

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

**Innovation is a critical component of Europe's defence readiness.** Disruptive technologies, their fast testing and embedding in defence capabilities and agile engagement with the tech community are essentials of modern warfare. EU funding will therefore be directed to stimulate R&D investment, catalysing additional private investment and promoting dual use startups. The

future EU Competitiveness Fund will place the focus on novel technologies and disruptive solutions from new tech actors. To provide a strategic frame, the Commission will present a **European Defence Transformation Roadmap** by the end of November.

Europe must ensure it stays ahead of the defence tech curve, in particular when it comes to the use of **Artificial Intelligence**. We must strengthen investment and innovation in Europe's **defence-tech-industrial base**, in particular when it comes to the use critical systems for modern warfare – whether drones, satellites or unmanned vehicles – where AI will be a determining factor for our ability to develop and produce the capabilities needed.

To support these efforts, the European Commission will also **accelerate simplification** to cut administrative burden, through additional **Omnibus proposals**.

**Defence manufacturing also depends on secure access to critical raw materials.** Strategic dependencies and bottlenecks in critical raw materials and components must be tackled. A risk analysis should be rapidly completed as a basis for taking clear targeted measures to address any weaknesses. These could include giving industry the possibility to obtain support for projects that secure supply, for instance through research into alternatives or through stockpiling.

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

**Promoting partnerships on security and defence** are essential for our defence industrial readiness. In line with the White Paper, the EU has taken concrete steps to advance its partnership agenda in the field of security and defence with allies and like-minded, notably NATO, with which the EDA will pursue a technical arrangement for the exchange of classified information. This is crucial to help enhance interoperability and reinforce industrial cooperation, as well as diversify supplies of raw material or critical components.

This model is pioneered with **United Kingdom** and **Canada**, with which bilateral agreements are being negotiated to allow their respective defence industries and products to benefit from joint procurement under the SAFE instrument. Defence industrial cooperations is also at the centre of Defence Industrial Dialogues with Japan and, potentially in the future, with India.

### ***5 – Ukraine as a key part of Europe's readiness effort***

Making Ukraine a 'steel porcupine' – indigestible to any invaders – is as important for Ukraine's security as it is for Europe's. This therefore also feeds into Europe's defence readiness efforts, which should further strengthen Ukraine and ensure Europe benefits from Ukraine's battlefield experience, innovative ingenuity and ramped-up industrial capacity.

This also contributes to **a framework of long-term security guarantees to Ukraine** that rests on: enduring legal arrangements; predictable multi-year finance and military supplies; close defence industrial partnership; clear consultative mechanisms; and a link to Ukraine's EU accession and postwar reconstruction.

At the heart of this lies a sustained effort to **harness Ukraine's Qualitative Military Edge (QME)**. To ensure Ukraine's QME over the medium term, the Commission is working on a **reparation loan**, funded with the cash balances associated to the immobilised Russian assets. This will create the predictable multi-year finance for Ukraine and ensure that Ukraine has access to a steady flow of superior equipment and weapons predominantly from European and own defence industry, in line with its battlefield requirements, fuelling **industrial partnerships with European**

**companies to innovate and scale-up.** Increased and better training, thanks to the EUMAM mission, and improved intelligence gathering will also be essential parts of Ukraine's QME.

The Commission's announcement of a **Drone Alliance** with Ukraine, which will be funded through the frontloading of 6bn euro from the ERA G7 loan, shows how this can work in practice. Ukraine will also be a full part of the implementation of EU financial instruments, like **SAFE and EDIP/Ukraine Support Instrument (USI)**, so that equipment is procured for Ukraine, with Ukraine and from Ukraine's industry as much as possible. Depending how much is realised in this respect, the Commission and the High Representative may propose **a possible complementary Ukraine-focused initiative in early 2026** to incentivise further efforts.

## **6 – Horizontal Enablers**

### *Towards a true EU-wide market for defence equipment*

A well-functioning EU and simplified **defence equipment market is a key condition** for achieving large scale production, economies of scale and defence innovation. It requires efficient, uniform and fair defence procurement rules, a reliable intra-EU transfer system, a robust Security of Supply regime, and widespread adoption of recognised standards and mutual recognition of certification. The **Defence Readiness Omnibus** contains proposals to address these issues. Co-legislators should adopt no later than end 2025. Similarly, the **2<sup>nd</sup> Defence Omnibus** should be adopted no later than December 2025 to better incentivise defence industry-related investment ahead of the next Multiannual Financial Framework (MFF).

### *Towards an EU-wide Military Mobility area*

**Military mobility is a crucial enabler** to ensure European security and defence, including for EU support to Ukraine. It is still too difficult to move troops and military equipment across Europe, as shown by exercises with Member States. In 2024, only half of the Member States were fully compliant with the 5 working days commitment. To spearhead progress, an ambitious **Military Mobility package** will be presented in November, including proposals to set up a unified regulatory framework ensuring seamless military movements across Europe, and targeted amendments to existing EU legislation to better accommodate military mobility requirements.

### *Ensuring adequate financial resources and investment*

Under the current MFF, EU instruments supporting the defence industry have shown their added value. Once into force, **EDIP** will offer new and specific tools for delivering additional capabilities, including flagship projects, such as the European Defence Projects of Common Interest (EDPCIs) or the Structures for European Armament Projects (SEAP).

The activation of the National escape clause (NEC) gave additional fiscal space to 16 Member States to further increase their defence spending. And the new Security Action for Europe (SAFE) instrument has been fully subscribed by 19 Member States, exhausting the full envelope of EUR 150 billion. In addition, Member States and regions reallocating funds towards defence investment, will benefit from higher prefinancing rates – up to 20% – and EU regions bordering Russia and Belarus will also receive targeted support.

In the next MFF, the Commission has proposed to **substantially increase the budget dedicated to Defence and Space**. Within the European Competitiveness Fund, Defence and Space would

benefit from a dedicated window of EUR 131 billion to support Member States' long-term effort to achieve defence readiness.

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

## **7. The way forward**

The discussion among Leaders will help inform the final Roadmap to be presented to the next European Council in October. As set out in this paper, the aim will be to set clear deliverables, focus on the most urgent and most strategic areas for Europe and speed up work across the board to ensure we are 2030 ready.