EU White Paper on defence lists AI and drones among priority capability gaps

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The Commission and the High Representative have presented a White Paper for European Defence – Readiness 2030 on 19 March 2025. The Commission has also presented, as part of the ReArm Europe Plan/Readiness 2030, an ambitious defence package providing financial levers to EU Member States to drive an investment surge in defence capabilities. While the ReArm Europe Plan/Readiness 2030 strengthens pan-European defence capabilities with new financial means, the White Paper frames a new approach to defence and identifies investment needs. The Commission also adopted a Communication on Accommodating increased defence expenditure within the Stability and Growth Pact.

White Paper for European defence - Readiness 2030

The White Paper offers solutions to strengthen the defence industry by closing important gaps and ensuring long-term readiness. It also suggests ways for Member States to invest heavily in defence, buy necessary equipment, and support the industry’s growth over time. Access the White Paper

Security Action for Europe - SAFE Regulation

A new financial instrument that will help countries invest in key defence areas like missile defence, drones, and cyber security. The funds will be raised on capital markets and disbursed to interested Member States upon demand, based on national plans. SAFE will encourage Member States to spend better, together and European. Access the SAFE Regulation

Increase defence expenditure within the Stability and Growth Pact

The Commission has invited Member States to activate the national escape clause of the Stability and Growth Pact, which will provide them additional budgetary space to increase their defence spending, within the EU fiscal rules. Access the Communication

Preserving Peace - Defence Readiness Roadmap 2030

The Roadmap sets out clear objectives and milestones to achieve defence readiness by 2030, as outlined in the White Paper for European Defence. Among its key proposals are four flagship projects: the Eastern Flank Watch, the European Drone Defence Initiative, the European Air Shield, and the European Space Shield. Access to the Roadmap

EUROPEAN READINESS 2030

To best answer to this radically changed strategic context, three lines of action should guide the EU and its Member States towards readiness 2030: Urgently closing critical capability gaps and supporting the EU defence industry , including through simplification of legislation and easing of administrative burden, to be able to produce at the requested speed and volume. This will also provide enhanced support for Ukraine. Preparing the defence of tomorrow by building a true EU-wide market for defence and accelerating the transformation of defence through disruptive innovation . Ensure readiness by 2030 for the worst extreme military contingencies, including through stockpiling, facilitating rapid movement of troops and assets across the Union and cooperation. The need

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

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

Closing the Gaps

At the core of the readiness objective is ensuring that Europe has the full range of capabilities needed to deter aggression and defend its territory across all domains, including land, air and sea, cyber and outer space. The European Council on European defence on 6 March 2025, allowed EU Member States to identify a list of Critical Defence Capability Areas for action at EU level. Building on this agreement, Member States have then defined the following initial priority capability areas: Air and missile defence: Integrated shield against all air threats (missiles, aircraft, UAS) with NATO C2 integration Strategic enablers: Including strategic airlift, air-to-air refuelling, maritime awareness, combat capabilities, and border security Military mobility: EU-wide transport network enabling rapid movement of troops and equipment Artillery systems: Advanced fire systems with modern artillery and long-range precision missile capabilities Cyber, AI, electronic warfare: Advanced systems for electromagnetic spectrum control and cyber operations Missile and ammunition: Strategic stockpiles with sufficient industrial capacity for timely replenishment Drones and counter-drone systems: Comprehensive unmanned fleet (air, ground, surface, underwater) with autonomous capabilities Ground combat: Full-spectrum, interoperable land combat capabilities for high-intensity operations Maritime: Enhanced naval capabilities to ensure maritime security, situational awareness, and protection of sea lines

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. Implementing collaborative projects is important to ensure cost-efficiency, economies of scale, interoperability, and faster delivery times. Next steps: Swiftly enhance collaborative defence procurement to achieve the 40% target set by the European Defence Industry Strategy (EDIS) using the SAFE instrument. It is proposed that Member States should collectively fill capability shortfalls by 2030, as part of the Readiness Roadmap.

Military Mobility and Infrastructure

Military mobility is key to European security and supporting Ukraine, ensuring fast movement of troops and equipment across the EU during crises. Despite progress, bureaucratic challenges and inconsistent procedures, like customs, disrupt efficient military transport. Next step: The EU will adopt a Joint Communication on Military Mobility, accompanied by the necessary legislative proposals, by the end of 2025.

To strengthen our defence and support Ukraine, the EU needs to:

Simplify regulations and prioritize military access to transport networks. Invest urgently in four critical corridors for efficient troop movements. Increase availability of dual-use transport assets through joint procurement and industry collaboration.

In addition, the Commission aims to:

Review and streamline existing regulations. Upgrade essential dual-use infrastructure. Remove obstacles hindering military transport.

Strategic stockpiles and Readiness pools

1 Supporting cross-border industrial partnerships Coordinate reserves of defence products, components, raw materials

2 Supporting procurement for strategic reserves Components and raw materials

3 Creating strategic reserves/Defence Industrial Readiness pools EU-made defence products

Supporting Ukraine

Rebuilding European defence begins in providing military support to Ukraine to be able to defend itself. Therefore, the most pressing priority is to increase and maintain support to Kyiv through three main lines of action: Enhancing military support to Ukraine and other form of assistance , in line with the EU's security commitments and the High Representative's Initiative for Ukraine. This includes enhancing the provision of ammunition, air defence, drones and direct support to Ukraine's defence industry, as well as we provision of enhanced access to space services. Proposing the association of Ukraine into EU initiative s aimed at the development of defence capabilities . This includes inviting Ukraine to share its defence priorities and operational needs for incorporation in the EU's capability development priorities, a possible expansion of the European Defence Agency Administrative Arrangement with Ukraine, and encouraging participation of Ukraine into EU initiatives, including the Permanent Structured Cooperation (PESCO) and the Coordinated Annual Review on Defence. Integration of the Ukrainian defence industry into the European Defence Technological and Industrial Base , including through the adoption and implementation of the Ukraine Support Instrument under EDIP and the scale up ofEU Defence Innovation Office. Furthermore, The EU will establish an EU- UA Task Force to coordinate and reinforce the work already done by existing bodies (i.e. EU Military Staff Clearing House Cell, Ukraine Defence Contact Group) and promote greater industrial cooperation. Next steps: Agreement on an ambitious new military support initiative for Ukraine, including artillery, air defence, and training. Integration of Ukraine's defence industry into the Single Market and extend military mobility corridors while exploring access to EU space-based services.

Supporting European Defence Industry

The EU defence industry lacks scale production capacity, it remains fragmented with dominant national players in small markets and cannot fully leverage the Single Market. The White Paper identifies several strategic lines of action to support the European Defence industry: Aggregated demand to ramp up defence industrial production capacity Fostering a more systematic aggregation of Member States demand Strengthening the dialogue with industry

Reducing dependencies and ensuring security of supply Observatory of Critical Technologies to identify materials and develop roadmaps Diversify supply sources while developing European alternatives

Building a true EU-wide market for defence, simplifying and harmonising rules Create one of the largest global defence markets to enhance competitiveness, enable cross-border collaboration, and allow startups to scale Focus on procurement, transfers, certification, and permit procedures By June 2025: the Commission will present a Defence Omnibus Simplification proposal

Transforming defence through disruptive innovation Support for advanced manufacturing processes and AI integration Create favourable regulatory environment for defence tech investment The EU will present a European Armament Technological Roadmap

Skills and talent to innovate A large-scale defence industrial ramp-up will require industry to attract, train, employ, up- and reskill far more talents Build expertise in STEM, autonomous systems, cybersecurity, and computing

As surge in defence spending

The ReARM Europe Plan has been presented by President Von der Leyen ahead of the EUCO on 6 March and was fully supported by Member States. It creates the conditions for the massive defence investment surge in Europe, with up to EUR 800 bn of additional defence expenditures expected in the upcoming years. The real amount of additional funding will depend on the willingness by Member States to mobilise additional resources. It builds on several pillars: Proposal to activate the national escape clause of the Stability and Growth Pact to support Member States' public funding in defence. Up to 1,5% of GDP, additional defence expenditures. Covering both investment and expenditures, for at least 4 years. This is expected to leverage up to EUR 650 billion across EU Member States. SAFE - Security Action for Europe : A new financial EU instrument to support Member States in boosting their defence investments (under Article 122 of the TFEU : allows exceptional response to exceptional circumstances). EU will raise funds up to a EUR 150 billion and provide loans to Member States for them to support achieving a rapid and significant increase in investment in Europe's defence capabilities. The plan also aims at mobilising private capital (including to accelerate the emergence of new defence players) by accelerating the Savings and Investments Union and through the European Investment Bank .

EU Defence Industry Transformation Roadmap

Unleashing Disruptive Innovation for the European Defence Industry The potential of some technologies for defence superiority is an important lever that needs to be urgently strengthened at European level. The rapid

evolution of defence capabilities is reshaping global security, making technological leadership more important than ever. The war in Ukraine has demonstrated how quickly defence technologies evolve and how dramatically they can alter battlefield dynamics. Innovations such as AI, quantum systems, drones and space technologies are transforming military operations, while new defence actors, from startups to SMEs, are redefining the defence industrial landscape. To respond to these evolving trends, the EU Defence Industry Transformation Roadmap aims to accelerate the modernisation of Europe's defence industry and provide targeted support to emerging players in the defence sector. The EU must draw the right lessons from recent conflicts and place agility, flexibility and speed at the core of its approach to European defence readiness. To achieve this, the Roadmap puts forward a set of key actions to address key challenges in four areas of action: Support the investment journey of New Defence companies , notably through the establishment of a € 1 billion fund of fund in support of growth capital; Accelerate the time to market of defence technologies , notably through a new instrument that will enable to develop, test and iterate in less than 12 months new solutions for military needs; Improve access to contracts and broaden the pipeline of innovative defence solutions , notably through Tech Alliances that will bring new defence actors to propose innovative solutions to military end-users; Foster the skills and talent to sustain Europe's defence technological edge. Next steps The Commission will immediately launch the proposals included in the Roadmap and scale them up as of 2028.

Timeline

ReArm Europe Plan/Readiness 2030

By March 2025 Fund reallocation for defence and security through the European Regional Development Fund

By the end of April Activation the National Escape Clause by Member states

17 June 2025 Defence Omnibus Simplification proposal

16 October 2025 Presentation of the Defence Readiness Roadmap 2030 requested by the European Council to set clear objectives and milestones

17 October 2025 European Defence Industry Programme (EDIP) and Ukraine Support Instrument (USI) validated co-legislator

19 November 2025 EU Defence Industry Transformation Roadmap

19 November 2025 Joint Communication on Military Mobility with legislative proposals.

Useful links

Press release Communication on Accommodating defence expenditure Regulation establishing the Security Action for Europe (SAFE) Questions and answers on the White Paper for European Defence – Readiness 2030 Questions and answers on the ReArm Europe Plan/Readiness 2030 Factsheet on Preserving Peace-Defence Readiness Roadmap 2030 Factsheet on the White Paper for European Defence – Readiness 2030 Factsheet on the ReArm Europe Plan/Readiness 2030 Factsheet on the EU industry transformation roadmap Audiovisual material