

News from the Brussels' Bubble



NBB #2025-6, 18 Oct. 2025

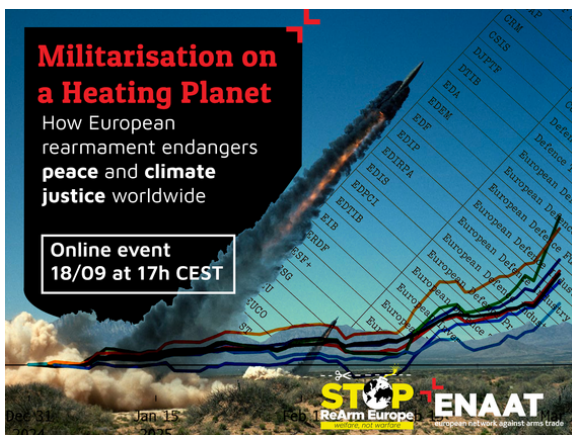
EU agenda

Unless indicated otherwise, EU official meetings take place in Brussels

- 20/10/25 • European Defence Industry Conference, Copenhagen
- 20/10/25 • Foreign Affairs Council, Luxembourg
- 23-24/10/25 • European Council
- 10/11/25 • Foreign Affairs Council
- 19/11/25 • EC to present Defence Transformation Roadmap and Military Mobility package
- 01/12/25 • Foreign Affairs Council on Defence
- 15/12/25 • Foreign Affairs Council
- 18-19/12/25 • European Council
- 01/01/26 • Cyprus Presidency of the EU starts

ENAAT & members' activities

- Watch the recording of our online event on "militarisation on a heating planet"



Missed our online event "Militarisation on a heating planet", recorded during the 2025 Global Week of Action for Peace and Climate Justice?

No worries, [the recording is now available online](#), and chapters allow you to listen your favourite speakers from Campaign Against Arms Trade, ENAAT, Nonviolent Peaceforce, Observatoire des multinationales and the European Environmental Bureau

Check more videos of past events on our [YouTube channel](#)

- ENAAT at the Emergency Festival, Reggio Emilia (IT)



ENAAT was invited to the [La Voce Festival](#) organised by the Italian humanitarian NGO Emergency, for a workshop on ReArmEurope and civil society mobilisation, animated by Claudio Jampaglia ([Radio Popolare](#)).

The discussion was recorded and is now [available online](#) (in Italian only).

EU funding for the arms industry

• MEPs & Council reach deal on EDIP: EU Military Sales mechanism to boost arms exports?

On Thursday 17/10, negotiators of the European parliament and the Danish presidency (negotiating on behalf of EU member states) reached a deal on the European Defence Industry Programme proposed by the Commission in March 2024, to boost military goods production and to support Member States buying weapons jointly.

Negotiations had last week stalled over differences concerning the size of the budget and eligibility criteria, i.e. the extent to which non-EU arms companies could benefit from EU funding.

Despite the [enthusiasm shown by the EP](#), and the [Socialists & democrats group in particular](#) (one of the main rapporteurs was the french S&D Raphaël Glucksmann) the final compromise remains very similar to the position of the member states [according to Euractiv](#):

Regarding the eligibility of non-EU companies, “negotiators retained the Council compromise [allowing] a maximum of 35% of non-EU components in the final product”, but also that “no restrictions [are] imposed on the use of the weapons by EU militaries” and that “companies receiving EDIP funds [can] modify products locally” (for example “replace a problematic component” as [explained by Euractiv previously](#)). The Council position however had introduced [possible exemptions from this ‘design authority’ criteria](#) for ammunition and missiles, something that Parliament considered unacceptable last week. They finally gave in in exchange for an unclear reformulation replacing ‘exemptions’ with ‘special arrangements’, probably not really any different.

The same goes for the budget: Parliament was clamouring for a substantial increase in the budget [in their pre-negotiation position](#) and [made this a red line as recently as last week](#).

Negotiators ultimately settled for vague promises from the Commission to use other existing funds and initiatives to support EDIP projects (a technique for virtually multiplying budgets that is highly prized by the Commission, which continues to propose new defence initiatives without additional funding, such as the Roadmap for Defence of 16 October, see below).

More problematic from our point of view is the fact that [key concerns raised by ENAAAT](#) when the proposal was released are still valid. In particular the creation of a European military sales mechanism, which will include a centralised catalogue of available European weaponry to “facilitate the delivery of defence products [and] amplify demand at EU level, but also “increasing the competitiveness of the European defence industry on the international market” as [underlined by the EU Council itself](#). In other words, to facilitate exports outside Europe.

• Next EU-long term budget: military focus a given, divergences on degree and scope

So far the EC had not given any details on how the €131 billion cash pot planned for space and armament in 2028-2034 (see [NBB 2025-4](#)) would be split between sectors. But recently [Commissioner Kubilius mentioned it could be a 50-50 share](#).

A large majority of EU research ministers back-up “opening up Horizon Europe to funding dual-use research”, but are more reluctant to “allowing the finance pot to be used for purely defence-related projects”, while “academics strongly opposed the prospect of the defence industry cannibalising civilian-purpose funds.” ([Euractiv](#)). The Parliament is divided on the issue, with some MEPs considering defence-linked research “an imperative”, and others “a threat to openness, academic autonomy and simplification.” ([ScienceBusiness](#))

The European Committee of the Regions (CoR) launched its working group on defence “in a proactive move to get its opinion taken into account over Europe’s various defence money pots” [reports Euractiv](#), and “to coordinate the different defence-related opinions of their various committees.” Most of the nine members of this working group “stressed the value of dual-use infrastructure for both civilian and military use.” It will also “focus on its local defence industries, civil resilience, regional cooperation on defending against hybrid threats, and the proposed EU budget for 2028-2034”.

• EIB: more money and faster decision-making on military projects

The European Investment Bank President Nadia Calviño announced that the institution has cut the decision-making time for security and military projects to six months, and confirmed that “it expects to spend 3.5% of its loans on defence this year”, [reports Euractiv](#). She also wrote to the European Council President António Costa that “the EU’s lending arm is ready to invest what could be millions of euros in Europe’s drone defence” (see below) [reports Euractiv](#).

- **SAFE loans: negotiations open with UK and Canada**

On 18/09, the EU countries meeting in Council format allowed [“the opening of negotiations with the UK and with Canada, respectively, on their participation in the €150 billion SAFE defence loan instrument.”](#) Negotiations are conducted by the European Commission and focus on the conditions for participation and level of contributions to SAFE. [According to Euractiv](#), negotiations are most advanced with the UK, and the draft proposal would fix a “50% cap on the value of equipment purchased” coming from UK companies (in line with the French position), as well as “an additional rule limiting other third-country components to 20% of a product’s total value if British parts are used.” As a reminder, the standard threshold allowed for third countries is 35% (see [NBB 2025-3](#)). Negotiations will nevertheless have to be concluded quickly if the UK is to have any chance of participating in SAFE, as Member States must submit their national plans to the Commission by the end of November. For its part, [Greece maintains its veto on Turkey’s participation](#) in the SAFE scheme.

- **EU-Israel: no sanctions and EU draft strategy, Elbit out! campaign**

[According to Politico](#), a draft strategy is to be discussed by EU foreign ministers and leaders on 20 and 23-24 October: it “sets out Brussels’ priorities for aid and reconstruction”. Besides “protect[ing] Palestinian statehood” and promoting the two-states solution, “in the longer term, the EU wants to play a role in the removal of landmines, the reconstruction of war-torn Gaza, investment and the facilitation of trade.” Following the ceasefire and Trump’s so-called peace plan, the “EU is unlikely to push sanctions on Israel” anymore [further reports Politico](#), and Israel remains “eligible for EU science money, despite blowing up Gaza university” according to [euobserver](#). [A broad coalition of Romanian and international organizations, launched on October 5th in Bucharest the research report and campaign “Elbit Out!”](#). The report reveals that Romania risks becoming complicit in international crimes, including the genocide in the Gaza Strip, through its ongoing military cooperation with Israel—particularly with the Israeli arms producer Elbit Systems.

- **Links**

[US criticises European defence production as too slow](#) | [Euractiv](#), 10/10/25
[European arms industry growth to beat 10% a year, Redburn forecasts](#), DefenseNews, 06/10/25
[Germany holds firm against French fighter jet project hysteries](#) | [Euractiv](#), 26/09/25
[Germany’s €80B rearmament plan sidelines US weapons](#), Politico, 23/09/25
[France seeks ‘mutually acceptable’ accord on next-gen fighter progress](#), DefenseNews, 22/09/25
[Germany explores how to replace France in Europe’s flagship fighter jet project – POLITICO](#), 18/09/25
[European-Ukrainian cooperation sparks next-gen combat robot](#), DefenseNews, 16/09/25

Other aspects of European militarisation

- **Defence readiness roadmap: Europe ready for war by 2030?**

On 16 October the European Commission [presented its ‘Defence Readiness Roadmap 2030’](#). This roadmap is meant to “translate the [March 2025 Defence] White Paper and the guidance provided by the European Council into clear objectives, milestones [...] and indicators to track progress” towards defence readiness by 2030; in other words, make Europe ready for war by 2030, allegedly to preserve peace through deterrence. The document largely reflects the recurring contradictions of EU militarisation policies, and seems to add extra layers of complexity rather than proposing a more efficient way to use resources. A significant proposal of the roadmap is that member states will collectively fill the nine identified capability shortfalls through ad-hoc “Capability Coalitions” led or co-led by one or several member states. A new option that adds to existing PESCO projects and transnational cooperation under EU-funded projects, although member states are encouraged to make use of existing frames (EDF, EDIP, PESCO) for these Coalitions. Clearly, the Commission has been recalled its place (mainly a cash-cow for the industry), and is offering guarantees of sovereignty to Member States (see below): the document multiplies references to intergovernmental structures such as the EDA and the EU Military Staff, and presents the Commission’s role as a simple facilitator in particular regarding European Readiness Flagships: a European Drone Defence Initiative and an Eastern Flank Watch (see below), a European Air Shield and a European Space Shield.

[Apart from the Coalitions and flagship projects](#), the roadmap is more about putting coherence among all existing initiatives and reminding or setting a number of milestones. It also proposes an “annual Summit of Defence industry [which] should involve governments, EU actors, primes, SMEs, mid-caps and tech innovators.” This will add to the three existing high-level events for the arms industry (the [EDA Annual Conference](#), the [European Defence and Security Summit](#) and the [European Defence and Security Conference](#)).

Apart from subsidizing the arms industry and production without serious quid pro quo, the Commission’s focus will be on supporting innovation and disruptive technologies (with a specific roadmap to be presented in November), accelerating simplification with the swift adoption of the ‘Omnibus for defence’ simplification package (see [NBB 2025-4](#)) by end of this year, “creating by 2030 a genuine EU-wide Market for Defence equipment, with simplified and harmonised rules” as well as “an EU-wide military mobility area by end 2027”, or supporting Member States “to reskill 600,000 people for the defence industry by 2030.”

The Commission will “present an Annual Defence Readiness Report to each October European Council” to evaluate progress.

The roadmap was presented to EU defence ministers on Wednesday 15 (see below) and “seems to have the support of most EU countries” [according to Euractiv](#), the main criticism being about the [lack of funding up to the level of proclaimed ambitions](#). This is a bit cheeky on the part of Member States who, at the same time, refuse to increase their contributions to the Community budget and who will also benefit from €150 billion through European debt over the next four years for their national military spending.

• Governments regain control over “Europe of defence” plans

Member States are meeting three times in one month to discuss European rearmament: at the informal summit held on 1 October, at the Foreign Affairs Council “defence format” on 15 October, and at the next European summit on 23 and 24 October. No decision was taken at the first two meetings, and the discussions reflected the [lack of a common vision among Member States](#), be it on the Eastern flank (see below) or on how to finance military expenditures ([either mainly existing EU funds and national sources or EU coordinated extra funding opportunities](#)).

But also on the [governance issue and the increasing role of the European Commission](#): large countries have signalled the end of the fun and games and decided to regain control over European military policies, starting with [Germany reiterating the importance of the EDA’s role](#). And this despite [serious disagreements](#) -again- between France and Germany about the next generation fighter jet FCAS, which could [“provide an opportunity for the Commission to take hold of more oversight.”](#)

At the informal summit “member states agreed to give the bloc’s defence ministers more authority in shaping security policy” [reports Euractiv](#), with defence ministers to “meet more often and carry more weight between leaders’ summits” instead of a “junior meeting of the Minister of Foreign Affairs Council.” Clearly “The centre of gravity is with the defence ministers [while] the European Commission would continue to drive industrial aspects.” [The invitation letter for the next European Council of 23 October](#) mentions discussing a bigger role for defence ministers and “reinforcing the European Defence Agency”.

• Drone Wall becomes EDDI and go South

Two of the flagship initiatives listed in the roadmap with precise milestones were already [announced in September](#) and discussed among member states: the Eastern Flank wall “aims to build-up the capacity of Member States on the Eastern border to face a wide range of threats, including also hybrid operations”, and the drone wall should be one of its main components. However previous discussions showed divergences among Member States [between largest economies and Baltic/Scandinavian countries](#) and well as an East-South divide: “European heavyweights France and Germany expressed skepticism of a drone wall managed by the Commission, while southern countries are pushing for a broader concept that will also protect their borders.” ([Politico](#))

Adding to this the incursions of unidentified drones in Norway and Denmark, the Commission revised its proposals to meet wider support, and the Drone Wall became EDDI, European Drone Defence Initiative, expected to be fully operational by end 2027 according to the roadmap: “This anti-drone system will be a shield for our entire Union, including the southern flank”, explained Ursula von der Leyen, and “Defence Commissioner Andrius Kubilius acknowledged Mediterranean countries were also on the frontline and had “different needs”. ([Euractiv](#))

“But key questions remain unanswered” further [reports Euractiv](#): “who would control activation, and how to pay for it. NATO is seen as indispensable for command and control, and non-EU countries like the UK, Norway, Iceland, and Switzerland could potentially be looped in.”

The two other flagships are the European Air Shield “to achieve an integrated, multi-layered air and missile defence protection for Member States, fully interoperable with NATO’s Command and Control system” and a “European Space Shield to ensure the protection and resilience of space assets and services” (Roadmap)

- **'Omnibus for defence': deregulation for the arms industry in progress**

On 23 September, the EP Industry Committee (ITRE) [adopted its position in favour of the 'mini-omnibus for defence'](#) presented by the Commission in April and whose main objective is to open more largely access to EU civil funds for armament projects and allow for their co-financing by several EU funds.

This is troubling not only because it diverts resources from important civil needs, but also because originally co-financing, for EDF projects for example, was supposed to come from Member States as a way to incentivise and make cooperation sustainable beyond EU funding: this move is therefore an admission of failure...

As [Member States also agreed their position on the file early October](#), the Parliament and the Council will now enter into negotiations, and the Danish presidency is hoping for a final deal before the end of the year.

However, the main part of the simplification package was presented in June (see [NBB 2025-4](#)) and is now being examined by the co-legislators separately before entering into negotiations. Among the 7 draft texts covering a wide range of issues from investments to intra-EU transfers up to environmental norms and corporate responsibility, one measure is in the spotlight [according to Euractiv](#): the easing of rules around establishing new factories. EU countries are quite reluctant to the EC proposals for fast-tracking permit requests within 60 days and an automatic approval in case of no response. Their "Counter-proposals include a timeframe longer than 60 days, and limiting the fast-track procedure to certain manufacturers based on criteria of eligibility, or by type of production (e.g. ammunition, air defence)." It seems unlikely that member states will reach a common position still in the autumn.

Still [according to Euractiv](#), member states have already agreed on the proposed exemptions to EU laws on chemical products, and an "overview report on simplification and implementation is to be presented on 21 October." Moreover, another Omnibus is to be expected by the end of the year on military mobility specifically. Commissioners are expected to "hold two 'implementation dialogues' with stakeholders per year" as well as "so-called 'reality checks' to liaise with practitioners implementing EU rules", that is mainly national civil servants.

- **Kyiv open for arms exports**

A key element of recent EU armament initiatives including the deregulation package, is to integrate the Ukrainian arms industry into the EU armament landscape and production, giving its products an EU -origin equivalent status, allegedly to support Ukraine in its war effort. Yet "Ukraine is ready to export 'certain types' of its surplus weapons [with] Agreements already reached on four export destinations: the United States, Europe, the Middle East, and Africa" [according to Eurativ](#) quoting [President Zelenskyy's evening address](#). Ukraine is not bound by the EU Common Position on arms exports.

- **Military objectives officially enter the EU's AI strategy**

On 8 October, the Commission unveiled its [Apply AI Strategy](#), "designed to enhance the competitiveness of strategic sectors and strengthen the EU's technological sovereignty [by] boost[ing] AI adoption and innovation".

[According to Euractiv](#), "the Commission wants to 'support the AI first policy in the defence and space sector', and push for more adoption of artificial intelligence by the military:" in particular use super-computing capacities (AI factories and gigafactories) to "train AI models and develop AI applications that would benefit the defence and space sector," develop "AI-enabled situation awareness and command and control capacities", as well as "dual-use tech to protect borders, critical infrastructure, and to create large scale projects like the Eastern Flank Watch and the Drone Wall." The Defence transformation roadmap to be presented on 19 November should push further "to leverage disruptive technologies, such as AI and quantum, for defence."

- **EU-India Security and Defence Partnership in the pipeline**

The Commissions adopted a new EU-India strategy, with [blessing from the Member States](#), which includes "closer collaboration (...) on security and defence matters". [EC President von der Leyen said](#) that "[they] are working towards EU-India Security and Defence Partnership [to] enhance cooperation, including maritime security, counter terrorism and cyber defence" which should include "an agreement of exchange of classified information and deepening ties between defence industry."

- **Links**

[Economic governance: Council approves Germany's fiscal expenditure path and its flexibility to increase defence spending](#), Council press release, 10/10/25

[Public support for EU defence spending past its peak, says poll | Euractiv](#), 07/10/25

[Space is the new frontier of war, officials say in change of tone](#), DefenseNews, 17/09/25