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EUROSATORY 2026

TOWARDS A RENEWED EUROPEAN DEFENCE?



fig. 1 : [Friday. The last day of the EUROSATORY trade show]

“Darn, where did I park my drone?”, SOULCIÉ

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§0. ABSTRACT. For decades, the European Defense Technological and Industrial Base (EDTIB) was calibrated for a post-Cold War era of low-intensity peacekeeping.¹ The sudden return of high-intensity conventional warfare on the continent since the invasion of Ukraine in February 2022 has forced a production shift, with European manufacturing pivoting toward advanced, automated architectures for mass production.² This mobilization is most visible in artillery ammunition, where fabrication capacities have surged from roughly 300,000 rounds in 2022 to an estimated 2 million by the end of 2025, a pace of expansion exceeding historical peacetime growth by a factor of three.³ This shift relies on micrometer-precision engineering for modern platforms, where single-component failures can jeopardize entire defensive grids in a larger scale European defense initiative. Risks of issues like this are numerous for NATO and European armies which have to train and operate together. Cooperation between European countries is, therefore, needed to prevent such issues and for a better use of the technologies each has to offer.

§1. THE UKRAINE IMPERATIVE AND THE TRANSATLANTIC FRACTURE. The current acceleration of European defense integration is a profound geopolitical recalibration. The ongoing war in Ukraine has functioned as an accelerant, transforming the European Union (EU) from a traditional provider of crisis management into a direct financier of arms production and wartime industry.⁴ However, this industrial buildup is increasingly framed by a “*transatlantic fracture*”. While European leaders remain publicly committed to the Atlantic bond, the unreliability of the American ally has created the need for “*strategic autonomy*”.⁵ As the European Council and Parliament have noted, the Union is now embedding itself in an economy where its own security is directly linked to its capacity to supply Ukraine without relying on the U.S. defense umbrella.⁶ This has given birth to a new, more urgent European Defence Industrial Strategy (EDIS), which mandates that member states should “*invest more, better, together, and European*”.⁷ With as much as 78% of military acquisitions previously flowing to

¹ “Defence Data 2024-2025.” *European Defence Agency*, 2025 <eda.europa.eu/publications-and-data/defence-data> accessed 29 June 2026.

² *Communication from the Commission to the European Parliament and the Council. EU Defence Industry Transformation Roadmap: Unleashing Disruptive Innovation for Defence Readiness.* COM(2025) 845, 19 Nov. 2025 <defence-industry-space.ec.europa.eu/document/download/513de692-d08c-40cc-80c3-cb6611ace178_en?filename=EU-Defence-Industry-Transformation-Roadmap.pdf>.

³ CLAPP, Sebastian. *European defence industrial strategy.* *European Parliamentary Research Service*, Sep. 2024 <[europarl.europa.eu/RegData/etudes/BRIE/2024/762402/EPRS_BRI\(2024\)762402_EN.pdf](https://europarl.europa.eu/RegData/etudes/BRIE/2024/762402/EPRS_BRI(2024)762402_EN.pdf)>.

⁴ “Acting on defence to protect Europeans.” *European Commission* <commission.europa.eu/topics/defence/future-european-defence_en> accessed 29 June 2026.

⁵ LESSER, Ian. *Far From Disengagement: The U.S. and the Mediterranean Today.* *Policy Center for the New South*, 18 Dec. 2025, pp. 4 <policycenter.ma/sites/default/files/2025-12/PB_64-25%20%28Ian%20Lesser%29.pdf>.

⁶ GIC, Ariana. “Europe’s Power is Defined by the Ability to Take Action in Ukraine.” *RUSI*, 20 Mar. 2026 <rusi.org/explore-our-research/publications/commentary/europes-power-defined-ability-take-action-ukraine> accessed 29 June 2026.

⁷ “Our common defence industrial strategy.” *European Commission | Defence Industry and Space* <defence-industry-space.ec.europa.eu/eu-defence-industry/european-defence-industrial-strategy_en> accessed 29 June 2026.

non-Eu firms, the current policy shift seeks to transfer that capital to European corporations, turning the EDTIB into a core pillar of the continent's long-term deterrence posture.⁸

§2. EUROSATORY AND THE NEW INDUSTRIAL BAROMETER. The 2026 edition of EUROSATORY (the world's leading defense and security exhibition) in Paris has become the definitive barometer for this new military-industrial complex. The French biennial event held since 1967 marked a departure from generic systems, in order to focus on high-intensity, multi-domain warfare.⁹ With more than 330 delegations from 93 countries, the exhibition emphasized a shift toward networked architectures where land, air, and space systems operate as a single, coherent grid.¹⁰ Regarding the industry's new mission, official organizers noted that the 2026 edition “*reaffirms more than ever EUROSATORY's mission: to be the place where solutions to the security challenges of the coming decades are conceived, debated, and developed*”.¹¹ Furthermore, counter-drone capabilities such as SKY WARDEN, MBDA's modular anti-drone system, took center stage to address the proliferation of asymmetric threats that define the current Ukrainian theater.¹² MBDA officials stated that “[i]n the face of rapidly evolving air threats, armed forces must now have increasingly integrated, responsive, and adaptable defence capabilities”.¹³ Underlying all these technological advancements was a renewed focus on sovereign resilience, with industry leaders prioritizing the development of closed-loop European supply chains to reduce reliance on non-EU raw materials.¹⁴

§3. COLLABORATIVE ECOSYSTEMS: THE NEW EUROPEAN INDUSTRIAL BOND. The most significant shift observed at EUROSATORY 2026 was the emergence of a “cooperative DNA” among contractors. To scale rapidly, firms are moving away from national isolationism toward cross-border industrial partnerships.¹⁵ The German industrial conglomerate RHEINMETALL AG serves as a focal point for rearmament,¹⁶ with consolidated sales reaching record levels in 2025 and a massive order backlog in 2026.¹⁷ The French company THALES is centralizing the continent's strategic capabilities. Speaking on

⁸ “European industrial strategy.” *European Commission | Internal Market, Industry, Entrepreneurship and SMEs* <commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/european-industrial-strategy_en> accessed 29 June 2026.

⁹ EUROSATORY website <eurosatory.com/en/> accessed 29 June 2026.

¹⁰ “EUROSATORY.” *Ministère des Armées | France* <defense.gouv.fr/en/eurosatory> accessed 29 June 2026.

¹¹ “EUROSATORY 2026: what is ‘multi-domain superiority’ ?” *Institut des hautes études de défense nationale*, 12 June 2026 <ihedn.fr/en/lundis-de-lihedn/eurosatory-2026-quest-ce-que-la-superiorite-multi-domaine/> accessed 29 June 2026.

¹² MBDA website <mbda-systems.com/> accessed 29 June 2026.

¹³ “EUROSATORY 2026: MBDA presents its vision for a multi-layered air defence against current and future threats.” *MBDA*, 16 June 2026 <mbda-systems.com/eurosatory-2026-mbda-presents-vision-multi-layered-air-defence-against-current-and-future> accessed 29 June 2026.

¹⁴ “Conflict Minerals.” *Ministère fir auswärtig an europäesch Ugeleeënheiten*, 5 Feb. 2025 <mae.gouvernement.lu/fr/directions-du-ministere/affaires-europeennes/organisations-economiques-int/minerais-conflict.html> accessed 29 June 2026.

¹⁵ “The European Defence Fund in detail.” *European Commission | Defence Industry and Space* <defence-industry-space.ec.europa.eu/eu-defence-industry/european-defence-fund-edf_en> accessed 29 June 2026.

¹⁶ RHEINMETALL website <ir.rheinmetall.com/en/investor-relations/> accessed 29 June 2026.

¹⁷ RHEINMETALL drives expansion forward and stays on course for success. *RHEINMETALL*, 11 Mar. 2026 <rheinmetall.com/Rheinmetall%20Group/Presse/News/Documents/2026/03/2026-03-11-Rheinmetall-presents-Annual-Report-for-2025.pdf>.

the integration of their air defense ecosystem, Hervé DAMMAN, executive vice-president of Land and Air Systems at THALES, remarked that “*THALES is proud to contribute to the sovereignty of our nations with SKYDEFENDER, the global air and missile defence dome based on our latest advanced technologies, from counter-drone protection to early warning capacities*”.¹⁸ Regarding the rapid tactical response required in modern conflicts, Julien Assoun, vice-president of Vehicles and Tactical Systems at THALES, added: “[w]ith RAPIDSTRIKER, THALES takes a decisive step forward in the fight against drones, providing forces a complete, agile and efficient solution, adapted to the protection challenges and the evolution of the threat”.¹⁹ The partnership between KNDS (France) and METLEN (Greece) — which presented the VBCI PHILOCTETES — serves as a prime example of this cross-border collaboration.²⁰ Vassilis TSIAMIS, CEO of Metallurgy Technologies at METLEN, emphasized this geopolitical necessity: “*Europe is entering a new era in which security and strategic autonomy require a strong and resilient defense industrial base*”.²¹ Similarly, Alain QUEVRIN, Country Director of THALES Belgium and Luxembourg, noted that “*building on our already proven laser-guided rocket solutions, Thales provides a solution to strengthen nations’ defence readiness against drone threat, one of the key challenges of our times*.”²² These partnerships are being actively catalyzed by the European Defence Fund (EDF), which mandates that consortia involve companies from at least three different EU member states to secure funding.²³

§4. FUNDING THE FUTURE: THE FINANCIAL ARCHITECTURE. The crucial test for this strategy is financial sustainability. In 2026, the EU has formalized a multi-layered funding architecture to bridge the gap between national budgets and shared security requirements.²⁴ The EDF remains a central engine for research and development.²⁵ Complementing this, the European Defence Industry Programme (EDIP)

¹⁸ “THALES launches SKYDEFENDER: the integral air and missile defence dome with Artificial Intelligence.” THALES, 11 Mar. 2026 <thalesgroup.com/en/news-centre/press-releases/thales-launches-skydefender-integral-air-and-missile-defence-dome> accessed 29 June 2026.

¹⁹ “EUROSATORY 2026: THALES launches RAPIDSTRIKER, a complete system for protection against drones.” THALES, 15 June 2026 <thalesgroup.com/en/news-centre/press-releases/eurosatory-2026-thales-launches-rapidstriker-complete-system-protection> accessed 29 June 2026.

²⁰ KNDS France and METLEN Energy & Metals Partner for the Production of the VBCI PHILOCTETES® in Greece. <knds.com/media/PR_Metlen_KNDS_251b560805.pdf>.

²¹ “METLEN and KNDS showcase VBCI PHILOCTETES Infantry Fighting Vehicle at EUROSATORY 2026.” Naftemporiki, 18 June 2026 <naftemporiki.gr/english/2125748/metlen-and-knds-showcase-vbci-philoctetes-infantry-fighting-vehicle-at-eurosatory-2026/> accessed 29 June 2026.

²² “EUROSATORY 2026: Thales launches next-generation 70mm laser-guided rocket dedicated for counter-drone operations.” THALES, 15 June 2026 <thalesgroup.com/fr/actualites-du-groupe/communiqués-de-presse/eurosatory-2026-thales-lance-une-nouvelle-generation-de> accessed 29 June 2026.

²³ “The European Defence Fund in detail.” *Op. cit.*

²⁴ Directorate-General for Defence Industry and Space. “Commission continues to strengthen European collaborative defence research and development with additional EUR 1 billion.” European Commission | Defence Industry and Space, 17 Dec. 2025 <defence-industry-space.ec.europa.eu/commission-continues-strengthen-european-collaborative-defence-research-and-development-additional-2025-12-17_en> accessed 29 June 2026.

²⁵ The European Defence Industry Programme. European Commission | Defence Industry and Space, March 2026 <defence-industry-space.ec.europa.eu/document/download/3864237c-f5b-4f50-80e8-dd41a5b19426_en?filename=EDIP%20WP%20factsheet%20v4.pdf>.

provides a strategic framework to incentivize cross-border cooperation.²⁶ The European Investment Bank (EIB) has pivoted its strategy, aiming to reach a 5% target of total financing dedicated to security and defense, while initiatives like the *Defense Equity Facility* are actively engaging private venture capital.

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²⁶ “EU Finance Ministers back EIB Group strategy for a stronger, more secure Europe in a more stable world.” *European Investment Fund*, 12 June 2026
<eif.org/press/all/eu-finance-ministers-back-eib-group-strategy-for-a-stronger-more-secure-europe-in-a-more-stable-world>
accessed 29 June 2026.