

THE AZURE FORUM
FOR CONTEMPORARY SECURITY STRATEGY

*Designing Defence Industrial Governance in
a Small EU Member State: A Case Study of
Ireland*

February 2026

Cáitríona Heinf¹

© 2026 The Azure Forum for Contemporary Security Strategy (CLG), All rights reserved.

This work is licensed under a Creative Commons Attribution Non-Commercial-No Derivatives 4.0 International License.

The information contained within this publication does not constitute legal advice and should not be relied upon as such. In addition, whilst every reasonable effort has been made to present current and accurate information, The Azure Forum makes no guarantees of any kind in this regard. Any use of or reliance on the information contained in this report is solely at the user's risk.

The Azure Forum does not take institutional positions on public policy issues; the views represented herein are those of the author(s) and do not necessarily reflect the views of the Azure Forum, its staff, or its trustees.

Introduction

The defence industry structures of smaller states have been traditionally underexamined, especially where prior analyses of European defence industry have primarily surrounded major arms producing companies and their markets.² This report therefore presents a case study of those opportunities and challenges for a small, EU Member State such as Ireland.

To date, no comprehensive analysis or study has been undertaken on the nature of this industry within a framework of the nation's approach to defence industrial governance. Nor is Ireland, for instance, covered in the first extensive edition on defence industry.³ This report thus provides an original contribution to knowledge of Ireland's defence industrial governance and the nation's defence industry. It provides a unique analysis within a fast evolving, interconnected domestic and European context.

The report concludes that there is a strategic domestic but also European imperative for the establishment of a more comprehensive, contemporary approach to applied research and enterprise engagement. This is brought about by the now-recognised need for a credible national approach to defence as well as the need for Ireland to foment its approach to fast-moving restructuring of collective European defence ambitions. There is a once in a generation need for the fundamental redesign of the nation's traditional approach to defence industrial governance and strategy. This will require change in defence industrial policy, established structures, and defence industry sector engagement to achieve Irish defence modernisation and contributions to collective European stability. This is an especially pertinent objective where the nation constitutes the most western flank of the European Union.

The defence industry in Ireland, as traditionally conceived, can be described as less developed - if not entirely undeveloped. Despite traditionally less developed defence industrial structures in Ireland, this report identifies several concurrent domestic and regional factors in Europe which should be driving a more urgent revision of established structures and approaches to defence industry matters. The report first examines the relevant policy architecture and role of defence industry stakeholders. It then identifies the implications of key trends, challenges and opportunities which are likely drivers of change for future defence industry governance. Key aspects which are examined include domestic factors such as enhanced national ambition for military modernisation, capability development and defence spend to bring about a credible defence of the nation. The meaning of profound change in regional dynamics (such as the radically fast-changing geostrategic environment in Europe and future warfare trends) for a small EU Member State like Ireland (which is an open economy and militarily neutral) is then considered.

An evolving Irish defence industry ecosystem: Humble beginnings to comprehensive strategy?

This section provides a stronger understanding of the composition and character of those stakeholders within the Irish defence industrial market with a view to determining implications for future defence industrial governance. While it is beyond the scope of this report to provide a comprehensive mapping of the industry sector active in Ireland, it aims to provide an

indication of the influence and positions of stakeholders within the industry sector itself as well as its engagement with government and civil service structures.

The sector can be broadly understood to comprise large international contractors, SMEs, start-ups/scale-ups, knowledge providers and applied R&D institutes. These entities are providers to the State of knowledge areas and areas of expertise, technological aspects and industrial capabilities. Until recent Irish government commitments to embark on modernisation of the Irish military, the defence industrial market would have traditionally been rather small and likely viewed as a comparatively unattractive market given the nation's small defence budget. There is consequently an unsurprising growing interest in the Irish market on account of new plans for military transformation, including defence spending increases to achieve heightened capability development ambitions.

Nonetheless, any such growing attractiveness of the current market to foreign suppliers, or indeed Irish enterprises, should still be viewed in the context that Ireland continues to have the smallest defence budget in the EU and one of the smallest in the world. Any potential for growing interest would also need to be analysed relative to the newly dynamic and increasingly competitive global market. States are enhancing military capability and growing out their own commensurate defence budgets in a manner not seen since the end of the Cold War.

Ireland is not viewed as possessing a major domestic defence industry as traditionally construed. As far back as 2010, there were estimates of 6.74 billion Euro for exports of products ranging from mechanical components, chemicals, software and communications equipment.⁴ Whereas other estimates suggest that Irish defence and security exports are worth approximately 2.3 billion Euro, with employment of 7,500 individuals and ten percent in the defence sector.⁵ Some figures indicate military equipment exports were valued at 42.3 million Euro in 2019, with an increase to 108.5 million Euro in 2020, where the majority of equipment was then exported to the United States.⁶ The country is home, however, to a growing number of companies developing dual-use products, with some estimates that this industry is worth over two billion Euro per annum.⁷

At the time of writing, no publicly available mapping of the entire sector has been undertaken or published to fully comprehend the current character and composition of the Irish defence industrial sector across each of the defence, defence-related/dual-use and applied R&D segments for national purposes. Such a mapping exercise would also ideally provide additional indicators surrounding those companies in Ireland which might be subsidiaries of foreign groups, or under control of foreign shareholders. Moreover, such indicators would be necessary to support EU ambitions to establish a common understanding among Member States of the actual composition of the European Defence Technological and Industrial Base (EDTIB). In this regard, the Irish Defence and Security Association (IDSA) commissioned the first report of its kind in 2021/2022 to garner an initial basic understanding of the sector. The report concluded then that a rigorous mapping of the sector was necessary. The report presents some notable observations, finding for instance that in early 2022 there were approximately 548 foreign and domestic firms active in the Irish defence ecosystem and concentrated across sectors such as aerospace, ICT and construction.⁸ In particular, it found that there is no

comprehensive data or reports on the size and scale of Ireland's defence sector. It seems that military and dual-use exports were then valued at approximately 2.4 billion Euro and the main destinations in terms of export licences in 2019 were the United States, United Kingdom and Australia. While the report provided some figures surrounding military exports or jobs, the sector is still not precisely understood in terms of its size; revenue and turnover; contribution to GDP and tax revenues; the breakdown of SMEs vis-à-vis larger companies; the number of jobs (direct; indirect and skilled); the character of products and services; and its future potential for growth.

While only indicative, the growing membership of IDSA does proffer a sense of the varying types of enterprises involved or becoming interested in this sector. IDSA was established in 2021 as the national defence industry association (NDIA) to represent enterprises in the defence and security sector for the first time in the Irish context. The current composition of the growing national cluster is a wide-ranging mix of enterprises with a diverse offering of products and services, ranging from large foreign suppliers; SMEs in the defence and dual-use sectors; innovative start-ups; large and boutique knowledge providers; venture capital firms; and applied R&D university institutes.⁹

While the national association established the first such catalogue of products and services in 2025, the creation of a centralised catalogue of defence products and services developed by Irish enterprises in their entirety would better support likely national and European developments. Most importantly, this recommendation would provide an evidence base for the actual modern character of the defence sector and thus dispel misconceptions. This is important where Ireland has been described as not having “a defence industry as such” but has “industry in the dual civ-mil use market”.¹⁰ Ireland does in fact have a defence industry, albeit not yet a base of indigenous primes. Official government documents from late 2025 now begin to describe more accurately the state of play whereby Ireland is understood to lack a traditional defence industry, but it is now viewed to possess a “strong SME sector with expertise in ‘dual use’ technologies – those serving both civilian and military purposes. In line with the 2024 Defence Policy Review, efforts are underway to define how to grow a commercial dual use sector that supports Defence Forces capability, creates jobs, enhances innovation, and accesses EU funding. Ireland's innovation ecosystem is well-placed to develop niche solutions in this area. As EU-level activity expands, it is increasingly important for Irish industry to position itself to seize emerging opportunities in this growing sector”.¹¹

In this regard and among other core activities, IDSA has established a critical convening power through its clustering approach. This is being achieved through its facilitation of networking, consultative engagements, policy shaping, advocacy and awareness raising among national and international stakeholders within the defence ecosystem. The association has created a mechanism to communicate actively on policy requirements at both national and European levels, engaging with relevant Irish governmental stakeholders and the community in Europe through its engagement as the Irish NDIA with the Aerospace, Security and Defence Industries Association of Europe (ASD); the European Defence Agency (EDA); and other EU institutions. This has come at a time when Ireland, EU Member States and the EU are undertaking large investments in defence which require solid policy foundations. In particular,

the association has been advocating since September 2024 that there is a near-term need to develop national defence industry strategy, levelling up from prior nascent thinking surrounding defence enterprise strategy.¹² Driving the policy agenda from outside government, it argues that Ireland has the potential to establish an even more innovative defence- and security-related industry sector. This could be achieved through a targeted and strategically enhanced fostering of the nation's defence-related enterprises and institutes (particularly where, in its current composition, Ireland has an especially good base of civilian SMEs in advanced technology).¹³

It could therefore be surmised that Ireland has a fledgling defence and security-related industry. It is still the case though that in terms of better predicting the potential for this sector over the near future, both domestic and regional demand as well as capability development priorities of national and like-minded defence forces are considered especially relevant for the defence industries of smaller states.¹⁴ The following sections of this report therefore aim to examine the relevant domestic and regional context with a view to identifying the implications for the potential of this sector in Ireland and its role in Europe.

Heightened domestic defence ambition but underdevelopment of symbiotic defence industrial governance?

A patchwork of national policy documents provides partial indicators as to the direction of the nation's overall approach to defence industrial policy. In other words, there is no defined governance architecture for national defence industrial policy or strategy.

Since the release of the historically significant government-commissioned 'Report of the Commission on the Defence Forces' in February 2022, the Irish government has been working to implement its subsequent commitment to achieve a new level of ambition, namely the so-called 'Level of Ambition 2'. The Commission's recommendations were published shortly before the invasion of Ukraine that same month and before the consequent geopolitical shifts in post-Cold War regional stability. In other words, the findings surrounding requirements for military transformation and modernisation were not then in response to the invasion or subsequent deterioration of the regional security environment. Level of Ambition 2 (LOA 2) is defined as enhanced capability for the Defence Forces which means "[b]uilding on current capabilities to address specific, priority gaps in our ability to deal with an assault on Irish sovereignty and to serve in higher intensity peace support, crisis management and humanitarian relief operations overseas".¹⁵ Whereas "Level of Ambition 3 (LOA 3) Conventional Capability for the Defence Forces" is defined as "[d]eveloping full spectrum defence capabilities to protect Ireland and its people to an extent comparable to similar sized countries in Europe".¹⁶

This first commitment to achieve LOA 2, reiterated in July 2024 to be government policy through the so-called 'Defence Policy Review', would mean a near 50 percent increase in national defence spending as well as the maintenance of defence funding increases. The Review explains that Ireland is indeed committed to increased levels of defence investment to enable the transformation of the Defence Forces and its capabilities, outlining the Government's prior

agreement to increase investment to €1.5 billion by 2028, with consideration thereafter of a move to LOA 3.¹⁷

Notwithstanding that this Review continues to provide approved government policy, seismic shifts have taken place in Irish political thinking and European assessments even over the short period since the review's release in July 2024. By January 2025, it was agreed within the then-newly elected government's 'Programme for Government' that new government ambitions will be to "[c]ontinue to increase investment in Defence, providing the funding and political support to achieve Level of Ambition 2 Enhanced Capability, and move as quickly as possible to Level of Ambition 3 with commensurate investment as appropriate".¹⁸ It is notable that, in the first instance, the Programme calls out the crucial need for political support to underpin the ability to achieve these levels of ambition. Secondly, prior government commitments were to only consider a move to LOA 3, after achieving LOA 2 by 2028. Whereas the new Programme delineates that it is now the Government's ambition to "move as quickly as possible" to LOA 3 (in other words, full spectrum defence). The Programme makes no reference to a mere consideration of LOA 3 after 2028. Even more notable for its omission, the Programme does not in fact reiterate 2028 as the milestone for achieving LOA 2 as per current government policy in the Defence Policy Review and prior government commitments.

In any case, the July 2024 Defence Policy Review lays out current government policy until 2028, as part of the fixed review cycle that aims to be responsive to the security environment and coherent with the development of a National Security Strategy and the EU's Strategic Compass.¹⁹ There is, however, scant reference to defence industry policy surrounding the enterprise and research sector. Nor does the Review specify national ambitions for industry. In addition, at the time of writing, the aforementioned 'National Security Strategy' has not yet been published so that analyses of the implications for defence industrial governance (or defence policy for that matter) within the national security framework are not feasible.

The document does provide a categorisation of the roles of the Defence Forces (which are said to remain consistent with the 2015 White Paper) until analysis is undertaken in the next review. While apparently not introducing any change, the wording surrounding industry is clear whereby the Defence Forces have a defined role to "contribute to Ireland's economic well-being through engagement with industry, research and development and job initiatives, in support of government policy" within the category of "contributing to national resilience and whole-of-government security objectives".²⁰ Moreover, the policy document merely alludes to EU-relevant developments such as determining implementation aspects of the first European Defence Industrial Strategy (2024); changes to financial supports; and a short explanation that the Department of Defence acts as the national focal point for the European Defence Fund (EDF), working closely with the Department of Enterprise Trade and Employment (DETE) to assist Irish enterprises and research institutes to avail of EDF opportunities. It further finds that, as a result of the changing security context, there will be an increasing need for innovative and collaborative efforts to ensure defence capabilities are developed, sustained and maximised - specifically that increased collaborative procurement and capability development with partners will be a feature of Irish defence capability planning to increase knowledge, subject matter expertise and skills and to improve defence interoperability, enhance value for money

procurement and capability development at EU level.²¹ This is important where the EU Defence Industrial Strategy, which sets a vision for the European defence industrial policy until 2035, lays out the ambition to progress a collaborative approach to defence capability development and procurement. It also means that there will likely be a need to examine the practical meaning of an evolving EU defence industrial focus for Ireland - and specifically, the meaning for defence industry in Ireland. It was, for instance, reported shortly after the release of the Review that the Department of Defence is in contact with other governments in relation to expedited acquisition of military equipment through a government-to-government approach.²²

The Department of Defence provides basic information online about the nature of the EDF whereby grant funding is provided to collaborative cross-border consortia of industrial entities to research and develop new defence capabilities (part of the annual budget is for projects with cross-border participation of SMEs and projects focused on emerging and disruptive technologies).²³ In the recent past, governmental focus for defence industry matters has also mainly seemed to surround defence innovation, most obviously encapsulated through the publication of the 'Defence Enterprise Strategy' in 2019. This strategy was said to put in place formal guidelines in the defence enterprise space whereby innovation and collaboration projects were then understood to have this 2019 document to build on policies from the 2015 White Paper on Defence.²⁴ The document mainly laid out the mission for the so-called Defence Organisation (understood to mean the Department of Defence and Defence Forces) in the enterprise space as exploiting new technologies to improve capabilities, and to inform the direction of technology developments which can support defence capabilities, to better enable the Defence Forces to undertake its roles.²⁵ The document further explains that partnerships between the military and the private sector on increased research, innovation and enterprise development is encouraged in the White Paper on Defence (2015); the Innovation 2020 strategy (2015); the 2016 Programme for a Partnership Government; and the Defence Strategy Statement 2017-2019.

Despite the nomenclature of the 2019 document, it is not what one would understand as defined defence industrial strategy. It does, however, notably specify and communicate the obvious link between defence enterprises and capability development (a point that is lost more often than not in Irish debates).

The document also provides context on arrangements for defence innovation or collaboration guidelines. It relates that the Department of Defence and Defence Forces, working with Enterprise Ireland, support capability development by raising awareness of and engaging with Irish-based enterprise and research institutes that are engaged in relevant activities.²⁶ The Defence Organisation has also been involved in collaborations with Irish enterprises, research and academia including participation in Horizon 2020 projects, and it is understood that the so-called 'Defence Enterprise Initiative' will continue to engage with Irish industry and research institutes where there is connection to capability development.²⁷ The Defence Enterprise Committee is overseen by the Defence Enterprise Ireland Coordination Committee, and both committees comprise personnel from the Department of Defence, the Defence Forces and Enterprise Ireland.²⁸

The 2019 strategy pre-dates the subsequent establishment of the civil-military Defence Research, Technology and Innovation Unit (Defence RTI) in 2021; annual challenge-based Science Foundation Ireland (now Research Ireland)-Defence Organisation Innovation Challenges in STEM disciplines; several defence innovation conferences; and the ‘Disruptive Technologies Innovation Fund’. The mission of this Defence RTI unit is understood to strengthen Ireland's defence capability and derive wider societal benefit by enhancing innovation capacity in defence and developing a robust innovation ecosystem across defence, government, industry and academia.²⁹ The unit was also originally tasked with supporting Irish industry and higher-level academic institutions in accessing EU funding from the EDF and engaging with the new European Innovation Hubs, European Commission and the EDA.³⁰

In addition, a new civil-military ‘Capability Development Unit’ was established in 2023 and while it is still growing its competencies and bandwidth, there are goals to establish a new Capability Development Planning Process by 2026; and delivering for the first time a 12 year Capability Development Programme.³¹ The Equipment Development Plan will continue to be progressed under the High-Level Planning and Procurement Group until the Capability Development Planning Process is in place. Department of Defence restructuring has also taken place so that there is now an Assistant Secretary position with responsibility for Strategic Change and Capability Development. This means that there is overall management and coordination of the relevant Procurement and Acquisition Branch; Capability Development Unit; and most notably in relation to defence industry, a new EU/Industrial Engagement Unit. The relatively recent creation of this new unit is a highly positive development as a means to provide dedicated engagement with industry on both domestic and EU matters. Department of Defence officials, acting as ‘National Focal Points’ for the EDF, work closely with DETE and lead the Department of Defence’s efforts which aim to ensure Irish enterprise and research institutes can avail of the EDF opportunities.³² More specifically, the new 2025-2028 Strategy Statement of the Department of Defence and Irish Defence Forces now explains that it is intend that this EU Industrial Engagement Branch would engage with Irish Industry and support their engagement in EU funding initiatives such as the European Defence Fund. In addition, the Branch will drive engagement with Irish SMEs in the security and defence field to address capability requirements for the Defence Forces, in line with the ongoing Capability Development Plan.³³

Nevertheless, it remains the case that less attention has been paid to establishing critical defence industry governance aspects or the requisite levels of enhanced engagement to support the obviously symbiotic relationship with industry where there is ambition for capability development to deliver a wide spectrum of defence services, domestically and overseas.

In addition, while there could be some domestic opportunity arising from major Irish defence procurements, Ireland has not yet developed defined defence industrial participation policy to actively bring about a deepening or widening of the Irish defence industry, defence-related technology and R&D segments for Irish security of supply requirements. Nor is there any mention of the role of industrial participation policy within the Defence Policy Review or relevant guidance within an overarching national defence industry strategy. This is the case

even where industrial participation can often be understood by other EU Member States to be a common requirement for supply contracts where processes align with national regulations, contract-specific requirements and the EU framework. Supply chain resilience and security of supply have become even more prevalent as top tier concerns on account of factors such as geopolitical turmoil; the invasion of Ukraine in 2022 and consequences for European security; and the Covid-19 pandemic. In fact, the Defence Policy Review specifies this changed security context as well as the fact that the conflict has brought about negative impact on procurement and capability development including in terms of cost, timelines, equipment availability and supply.³⁴ Relatedly, while there are announcements surrounding government-to-government contracts, there does not seem to be clarity surrounding industrial participation policy within this approach and the meaning for Irish industry specifically.

In other words, it should not be assumed that increased national defence budgets, even record allocations, mean that there are enhanced opportunities for Irish enterprises to meaningfully compete for Irish government defence contracts. This is especially the case where Ireland does not have the indigenous means to develop large-scale defence projects (nor the likely need, albeit warranting further analysis). This means that establishing mechanisms to allow for Irish enterprises and the Irish economy to benefit from foreign procurements is likely critical.

While economic and employment-related considerations are not grounds for restrictions under EU treaty law under the rubric of industrial participation policy, downstream economic effects would likely accrue if such policy is put in place. At this time, Irish enterprises and the national economy would likely only benefit on an ad hoc basis from the significant increases in both Irish and EU Member States' defence spending. It is not a certainty that economic benefit accrues. The economic impact of defence spending or likelihood of GDP growth would depend on the type of expenditure and whether it is imported or produced locally.³⁵ Specifically, while it is beyond the scope of this report, there is a need for analysis to determine what percentage of Irish defence procurement is spent on non-Irish military imports (analysis should further proffer the percentage spent on non-EU imports). Given limited strategic and practical support to the industry in Ireland and no industrial participation policy, it is uncertain that economic benefit to the nation is accruing from either national or European ambitions currently.

It does not yet seem to have entered mainstream consciousness that even with a small, but growing, defence and security-related industry sector, that this sector is strategically critical for serving the interests of the Irish Defence Forces as well as benefitting the economy more broadly. Such recognition has been long made in other EU Member States such as the Netherlands.³⁶ Overall, it has therefore been recommended by bodies such as IDSA that the changed strategic environment, Irish defence policy framework and both national and EU capability ambitions now demand direction on the optimal future composition of Irish defence segments through defence industry strategy.³⁷

Despite the clear vacuum on positions within national policy documents, there is a very clear high-level understanding by leadership of the criticality of defence industry within the context of increasing focus in the EU on the need for Member States to invest more in security and defence with growing focus on defence industry since the publication of the Strategic

Compass.³⁸ Moreover, the seminal Draghi report which outlines three areas to reignite sustainable growth for future European competitiveness and innovation identifies that the third area for action is increasing security and reducing dependencies, noting that the European defence industry is suffering from decades of underinvestment and depleted stocks.³⁹ Specifically, under proposals for a new industrial strategy, the report recommends that Europe will need to develop defence industrial capacity that allows it to meet increasing demand for military assets and equipment and remain at the forefront of defence technology. The defence sector is listed as one of the sectors which will be a key driver of innovation for the entire economy.⁴⁰

Whereas in Ireland, this connection between defence industrial capacity and future sustainable growth and competitiveness has not been implemented to any significant degree. Nor has R&D/R&T spending been prioritised to the same degree as evident in other leading markets. The United States has, for instance, prioritised R&D/R&T spending over all other military categories since 2014, displaying ambition to retain global technological leadership.⁴¹ Although the Defence Organisation Strategy Statement (2023-2026) does acknowledge that as part of the strategic goal of development and maintenance of capabilities that there is planned increase of focus on RTI together with engagement with external institutes, enterprise and evaluation.⁴² In a new and highly significant departure, the Government's September 2025 Action Plan to enhance competitiveness and productivity includes a priority for the Department of Defence within the 2025-2030 period to continue to progress the interests of Irish SMEs "to facilitate growth and ensure deeper engagement in the commercial dual use area - both nationally and at an EU level. In that context, Ireland will look to enhance its engagement and identify opportunities for Irish SMEs in EU collaborative defence research and development programmes such as the European Defence Fund".⁴³ The Action Plan specifies that it is particularly informed by the Draghi Report, including its focus on increasing EU strategic security and reducing dependencies.

Comparatively, smaller EU Member States such as Finland (notably neutral until more recently), specify that they "must possess the industrial and technological expertise required for maintaining and updating its critical systems so that their independent use can be ensured in all circumstances. Most of this expertise is in the domestic defence industry".⁴⁴ In the Irish context, the Government continues to affirm that it does not intend to impact or change the policy of military neutrality whilst developing out capability.⁴⁵ In this case, comprehensive strategy would be necessary as another aspect of Ireland's military transformation endeavours in order to provide transparency and awareness about the precise role of defence industry within the bounds of the Irish policy framework of military neutrality. This would need to further align with the nation's legislative regime and answer questions such as whether Ireland should or should not pursue sovereign industrial capability.

This exercise would further serve to communicate officially and publicly the role of industry as underpinning Irish defence capability, thus disbanding misconceptions. Where, for example, EU Member States such as Austria (and until recently Finland and Sweden) are neutral with mature defence industries. As is Switzerland, although it is not an EU Member State, and "the myth that a 'Defence' industry is incompatible with 'Neutrality' is clearly wrong".⁴⁶ This is

critical where there is now official acknowledgement of a requirement for public engagement on defence matters in Ireland.⁴⁷ Notably, EU public opinion surveys have recently found that 69 percent of Europeans consider that the EU should reinforce its capacity to produce military equipment.⁴⁸ This proposed exercise might therefore further serve to inform mindsets across the ecosystem conceptualising industry as primarily relevant to procurement, moving instead towards a relationship mindset to bring about resilience.

The Department of Defence writes that “Ireland has a responsibility through its Defence policy to invest in the defence of the state, to protect our citizens, our values and our sovereign interests and to continue to contribute to international peace and security.”⁴⁹ It is clear therefore that Ireland’s defence policy response to profound changes in its national and international security environment as well as the State’s realignment as to how it manages risks must now include comprehensively addressing its approach to the integral role of industry.

It is beyond the scope of this report to examine or recommend good practice frameworks for such defence industry strategy. Examples of measures could likely include reducing red tape; export and trade stimulating measures, promoting the internationalisation potential of domestic industry where no such support for international opportunity is yet in place; establishing dialogue with industry to provide predictability; underscoring Irish ambition; establishing closer relationships between universities/research centres, the Department of Defence and defence industry; and providing cybersecurity support to the industry base. This would further include clarification surrounding coordination of the roles of relevant ministries and state agencies such as DETE; Enterprise Ireland; IDA; the Department of Foreign Affairs; the Department of Public Expenditure and Reform; and the Department of Finance.

Where governments are understood to be the market, defence procurement practices shape the national defence market so that government can use its purchasing power to determine the ownership, size, structure, and performance of its national defence industry.⁵⁰ Whether past Irish procurement practices have wittingly shaped the current state of the national defence market warrants analytical examination. As importantly though, as Ireland embarks upon major military modernisation programmes, future procurement practices will indeed shape the Irish defence market. This should therefore warrant an approach that consciously carves this market through a strategic and prioritised manner. Such an approach would also then answer whether Ireland should indeed focus on niche segments, to serve national and European interests.

Recent statements within the Oireachtas on behalf of the Minister of Defence at the beginning of 2026 provide the closest indicator to shifts in policy thinking surrounding defence industrial matters. Among other aspects, it is now on the record and understood that “[b]y embedding local participation requirements such as in-country maintenance, training, technical support or supply chain involvement, the State can help foster specialist eco-systems around key defence assets. Over time, this builds institutional knowledge, reduces reliance on external providers and enhances sovereign capability in critical areas...Work is ongoing to ensure that future defence procurement fully considers life-cycle costs, sustainability and opportunities for meaningful local participation...A well-designed local participation framework is both pragmatic and beneficial. It strengthens defence capabilities, improves availability, supports

resilience and ensures the investment in defence delivers lasting benefits for the State and Irish society as a whole”.⁵¹

This is especially pertinent where, already since the release of the Defence Policy Review in 2024, major changes continue to take place in European geostrategic assessments, bringing about commensurate shifts in defence expenditure ambitions and expedited defence readiness timelines. The next section of this report therefore considers how Ireland fits into this new European reality as well as the impact of fast changing European priorities for Irish defence industrial governance and the potential of this sector in Ireland. This context is important where small states must consider major global and regional security concerns as well as likely future areas of growth through identifying them in modern warfare trends when designing defence industrial policies.⁵²

The meaning of the shift towards common European defence priorities: Irish industry potential albeit far from a certitude?

Even shortly after the release of the Programme for Government in January 2025 and despite the already much changed regional security environment since the invasion of Ukraine in 2022, announcements from the Trump administration in early 2025 that it would no longer support European security commitments brought about deeper urgency for higher defence expenditure requirements across Europe. Analysts then explained that the presence of the United States in Europe will likely shrink and within this context Europe’s targets of defence spending were moving from two percent of GDP to 2.5 percent, three percent or even higher with some countries such as Poland at over four percent.⁵³ EU Member States such as Lithuania and Latvia were already aiming to reach or exceed five percent in the 2025-2027 period.⁵⁴ By early Summer 2025, new defence investment commitments of five percent of GDP annually were agreed at the NATO Summit, to be broken down between 3.5 percent for core defence requirements and 1.5 percent for defence- and security-related spending by 2035. The latter 1.5 percent is expected to be allocated to goals which specifically include innovation and strengthening the defence industrial base. In the EU context, the European Commission and High Representative of the Union for Foreign Affairs and Security Policy within the ‘Joint White Paper for European Defence Readiness 2030’ of March 2025 identify that a “massive increase in European defence spending is needed” to develop the necessary capabilities and military readiness to credibly deter armed aggression.⁵⁵

Given that 23 out of 27 EU Member States are members of NATO, the new NATO defence investment commitments, and specifically for the purpose of this report those surrounding innovation and defence industrial ambitions, have become the new de facto norm across the EU’s Member States for defence spending guidelines. Moreover, as part of the 2014 Wales Defence Investment Pledge, it was agreed that at least 20 percent of defence expenditure should be allocated to spending on major equipment including associated R&D as an indicator of scale and pace of modernisation – among other risks, failing to meet this guideline is perceived as risking the weakening of the defence industrial and technological base.⁵⁶

By comparison, the EDA December 2024 analysis of total defence expenditure as a percentage of GDP by EU Member States for the period 2022-2023 specifies that Ireland's expenditure was 0.2 percent.⁵⁷ By 2024, this figure was 0.24 percent.⁵⁸ Ireland was one of the 11 EU Member States which increased their defence spending in the 2022-2023 period by up to ten percent, but a year later within the 2023-2024 period it was one of only two EU Member States to record a decrease in total defence expenditure.⁵⁹ In relation to comparator national defence spend, the Irish Defence Policy Review does acknowledge that Irish defence spending remains behind similar states, while also noting that many of these states have increased defence spending on foot of the invasion of Ukraine.⁶⁰ It does not spell out, however, the stark reality that Ireland has had one of the lowest, if not the lowest, defence spend among EU Member States. This was the case even before more recent EU Member State defence spend increases since the invasion of Ukraine. This means that Ireland ranks as the lowest of all 27 EU Member States (including most notably, all neutral EU Member States); approximately 1.8 percent behind NATO's 2014-2025 guideline of at least two percent; and approximately 4.8 percent behind the 2025 NATO Summit overall defence investment commitments. It has also been ranked as among the top five nations with the lowest defence spend (2023) in the world.⁶¹

It is thus clear that there is a high risk that Ireland will fall even farther behind new European defence expenditure norms (including good practice allocations for innovation and defence-related industry matters) in this radically changed regional geostrategic context. Even within the current Irish defence allocation, it is also not clear that there is dedicated funding in support of defence-related industry matters aligned with good practice. This means that there could be good reason to recommend that the next allocations should include strengthened support of defence industry matters as well as enhancing innovation/R&D spends. As is the case at EU level, analysis could be undertaken at national level to quantify Ireland's financing needs for defence industrial readiness commensurate with the actual change of the security paradigm and how to ensure such financing. To further emphasise these arguments surrounding the significance of such low defence spends, it is notable that the National Risk Assessment 2024 identifies that the risks to Ireland posed by armed conflict, terrorism and other security threats are potentially compounded by Ireland having one of the lowest levels of investment in military and defence capabilities in Europe.

In late February 2025, the Tánaiste and then-Minister for Defence, Simon Harris, announced that he asked for the preparation of costings, actions plans and timelines to achieve LOA 3, emphasising nonetheless that LOA 2 must be achieved before the Government can move to LOA 3.⁶² By the end of March 2025, he, too, was emphasising that investment in Ireland's defensive capabilities needed to take place with a degree of urgency.⁶³ Despite these political announcements, however, current policy as laid out in the Defence Policy Review specifies that as part of the Commission on the Defence Forces 'Defence Implementation Plan' there is a commitment to undertake a capacity and capability assessment in 2027 to inform the military capability requirements for a decision on a move to LOA 3.⁶⁴ It is therefore not clear how costings, action plans and timelines can be prepared in the absence of such capability and capacity assessment. Or alternatively, if it is now understood that such assessment would

instead take place before 2027 (notwithstanding that proposals were said to be put forward in mid-2025 for the revised National Development Plan for the 2029 and 2030 periods⁶⁵).

This is especially relevant where there is clearly a shift in expectations surrounding urgent defence expenditure across Europe. It is also significant on account of proposals to achieve military readiness by 2030 to credibly deter armed aggression as laid out by the EU White Paper. This is in the context where European leaders assess that there is a threat not only to the survival of Ukraine but to the EU itself, and the risk of attack on an EU Member State cannot be ruled out.⁶⁶ The tone and calibre of very recent high-level political rhetoric in Ireland seems to be displaying indicators of becoming more in tune with such expedited timelines and urgency in Brussels. Yet, such rhetoric is not congruent with the actual state of affairs. It remains the case that the current policy to achieve LOA 2 by 2028 means that it is unlikely, without a shift in official policy, for Ireland to achieve these new European norms of ‘defence readiness’ by 2030. This is the case despite recent threat assessments and widespread consternation that this period is in fact a time of emergency and a challenge that is seen as existential for the EU.

In short, Ireland’s current posture is aiming to address critical capability gaps, not unlike many EU Member States in the current climate, albeit from the lowest base. But, unlike the rest of Europe which has rapidly moved on in its thinking, the Irish government does not yet seem to be aiming to change course and implement in practical terms the requirement for a posture that enhances defence readiness and preparedness to prevent high-intensity conflict scenarios by 2030.

It is the case that an additional challenge does arise in the Irish context in relation to the practical implementation difficulties for military modernisation which is starting from the lowest base in Europe. The Government has put in place an implementation plan that reflects widely accepted ambition to establish solid long-term foundations. Broadly speaking, there seems to continue to be a sense that more funding for capability could not even be spent fast enough and capacity is already stretched. For instance, in terms of achieving LOA 3 before LOA 2, media reports military sources as explaining that “the Defence Forces can’t absorb that much change at once...[i]t is already undergoing a massive programme of reform.”⁶⁷ There is a question to now be answered though as to whether this line of thinking is reflective of the early 2022 strategic environment, rather than reflecting the very real, new sense of urgency and ambition for defence readiness across Europe to preserve future peace. An ambition already notably underlined by the European Council in December 2023 in line with the Versailles Declaration and the Strategic Compass for Security and Defence that more must be done to fulfil the Union’s objectives to increase defence readiness.⁶⁸ Moreover, the Irish Defence Policy Review does indeed now specify that Ireland has a responsibility to its neighbours and EU partners to contribute in key areas to the defence and security of Europe.

In other words, the Irish Defence Policy Review, which specifies its congruency with the Strategic Compass, does not seem to be completely aligned with European defence readiness objectives in practical terms. Nor do recent budgetary decisions pertaining to defence budgets such that Ireland will become in very practical terms even more of an outlier in defence. This would seem to warrant analysis as to the evidence base for these finance decisions as compared

to assessments across Europe that defence readiness is imperative in this current geopolitical environment. This is the case even where proposals were apparently made in 2025 to double defence spending and increase national security funding as a matter of urgency.⁶⁹ Where the recent National Development Plan Review (2025) touts its ambition as the plan to secure Ireland's future prosperity, it fails to take on the good practice understanding that security is a precondition for sustainable growth (as also emphasised in the Draghi report).

This might mean there is good reason to reflect on how the Government might have considered weighing up the value of new European financial mechanisms (current or future SAFE instruments, among the other pillars of the European Commission's ReArm Europe Plan/Readiness 2030 which proposes to leverage over €800 billion to boost defence spending through financial mechanisms). Through SAFE, the EU will provide up to 150 billion Euro in loans to interested Member States. The other pillars are boosting national defence funding by activating the Stability and Growth Pact's national escape clause that could enable Member States to allocate additional public funding for national defence by up to 1.5% of GDP⁷⁰; making EU instruments such as the cohesion funds more flexible to allow greater defence investment; complementing public funding with contributions from the European Investment Bank; and mobilising private capital.⁷¹ At the time of writing, Ireland is not listed as one of the 16 EU Member States to activate the national escape clause. Nor is it likely that the country would have indeed even required loan facilities.

In this profoundly changed national and international security environment, questions should be asked as to whether it is possible for strategic thinking and implementation ambitions to be revised once again to reflect this new reality – one which is said to include the real prospect of full-scale war. Not unlike recent past emergencies, such as the financial crisis or pandemic response, it is worth positing that it could be possible to achieve higher levels of ambition in a shortened timeframe. But this would likely only be achieved with requisite political willingness and a fundamental shift in systemic mindsets to both prepare and prevent proactively in advance of what is assessed as a would-be potential emergency. By taking this proactive approach, this would mean government's social contract to the nation could be met responsibly as well as enabling solidarity to Europe (which should in any case be within the bounds of Ireland's own strategic self-interest, whilst also balancing important needs to allocate resources effectively). Indeed, the Minister of State for European Affairs and Defence specifically highlighted the need for solidarity in May 2025 in the context of remarks on security and defence within plans for Ireland's 2026 EU Presidency, explaining that “[a]t this crucial juncture for Europe, and as we look ahead to our EU presidency, Ireland must demonstrate that same solidarity with our European neighbours, in understanding their urgent needs when it comes to security and defence”.⁷² Moreover, good practice indicates that defence spending should clearly be allocated to far more than ‘kit’ or equipment, but across the DOTMPFLI spectrum. In the context of this report on defence industrial governance, for instance, allocations to innovation and defence industrial matters are clearly part of military transformation and defence readiness ambitions. EU leaders at the European Council (December 2023) similarly then concluded that there is a need to strengthen the European defence technological and industrial base.⁷³ And more specifically EU leaders through

European Council meetings, including Irish leadership, have expressed commitment to reinforce overall defence readiness, reduce strategic dependencies, address critical capability gaps and strengthen the European defence technological and industrial base. But again, it is not clear how this is being fomented domestically in Ireland. This national challenge for Ireland is not too different to that across Europe where, for example, the EDA too recommends that it is crucial to allocate additional resources from heightened defence spending effectively for long term futures following a long period of under-expenditure while also balancing out the short-term needs.⁷⁴

Unlike current Irish defence policy documents, the EU White Paper specifically emphasises that in order to achieve military readiness, there is the need for a stronger and more resilient defence industrial base as well as a technological innovation ecosystem for European defence industries to keep pace with changes in the character of war. It explains that the European defence industrial sector is an indispensable prerequisite of defence readiness and credible deterrence. Put another way, Ministerial level speeches outside Ireland in early 2025 are already highlighting that at these geostrategic crossroads, “transforming European defence industrial capabilities and boosting capacity are going to be integral to this defining mission of our time”.⁷⁵ The Irish government is understood to be broadly supportive of EU White Paper proposals (with the caveat that any initiatives be voluntary in nature) and where “defence, apart from defence industry, remains a member state competence”.⁷⁶ There is, however, little Irish policy literature or Ministerial level announcements calling out or emphasising such a crucial and integral role for industry, and more specifically Irish industry - either as a prerequisite for achieving credible defence or military readiness with a goal of preventing aggression to secure peace.

In relation to Irish positioning on European military readiness, these EU initiatives are timely insofar as it would currently suit domestic Irish capability requirements that EU initiatives thus far support the strengthening of national capability across the Union. Indeed, the Defence Policy Review had already recognised that there will be an increasing need for collaborative efforts to ensure Irish defence capabilities are developed and sustained. In other words, it is likely not a problem for Ireland that concerns expressed by experts include ensuring that these European plans avoid reinforcing national fragmentation in defence procurement.⁷⁷

Notably though, while deeper analysis is beyond the scope of this report, it is likely that questions should ensue as to the practical meaning of EU White Paper proposals for the Irish military neutrality policy framework. For now, it is reported that in response to the White Paper, there are no plans to change the policy of military neutrality, but there is understanding of a need to enhance individual and collective preparedness and capability.⁷⁸ Ireland has confirmed in recent years that it “cannot stand on the sidelines at a time of shifting security dynamics, and that investing in Ireland’s own security and defence capabilities, as well as deepening defence cooperation on the EU level, does not represent a departure from neutrality”.⁷⁹ While this is rightly constructive, there could be a plausible challenge for Ireland whereby, in this generational shift in EU defence ambitions (including those European Commission President proposals to move towards a European Defence Union), 23 EU Member States are within the European arm of NATO; NATO is the cornerstone of European collective defence; and the EU

White Paper specifically emphasises how the EU regulatory power and financial instruments will help the 23 EU Member States in NATO and EU support to collaborative capability development facilitates these same 23 Member States. It seems there might be a circle to square as to whether this does indeed amount to de facto military alignment (albeit recognising that the Irish policy of neutrality is currently characterised as “non-membership of military alliances and non-participation in common or mutual defence arrangements”⁸⁰). Ireland continues to be one of only four neutral EU Member States, and it is not a member of NATO (but it is a long-standing member of the NATO Partnership for Peace). Notably, the Oireachtas Joint Committee on Finance, Public Expenditure, Public Service Reform and Digitalisation expressed concern in July 2025 about the SAFE instrument, among other EU Regulations on funding defence spending, with particular concern about the impact on military neutrality policy.⁸¹

In practical terms, much of the official Irish industry-related attention has mostly centred upon EDF opportunity or innovation. In relation to the EDF, questions have however been raised about how capable Ireland is of gaining return on investment, despite a contribution of approximately 150 million Euro for the 2017-2021 period for instance.⁸² Ireland was also viewed as comparatively unsuccessful to other similarly sized EU Member States within the European Defence Industrial Development Programme where, for example, Cyprus, Bulgaria and Estonia all ranked higher in success rate percentage in 2019 and submitted more projects than Ireland.⁸³ For the 2021-2027 period, the Irish contribution to the EDF is again approximately 150 million Euro. The country is viewed to be one of the least active participants - between 2021 and 2022, Irish entities were involved in seven projects, receiving only 11.6 million Euro in grants (with universities being the main recipients of research funds).⁸⁴ This is the case despite the Department of Defence acknowledgement that Ireland does have industry in the “dual civ-mil use market who may be able to access funding through positioning on the supply chain, and in the ring fenced funding for projects comprising Small and Medium Enterprises (SMEs) and for Emerging and Disruptive Technologies (EDTs)”.⁸⁵ In short, while there is acknowledgement of the importance to enable opportunity for Irish enterprises in the EDF, the opportunity is not fully realised and several practical barriers remain (such as, for example, the lack of a personnel and facilities security clearance regime which the Department of Justice has committed to addressing, while a temporary regime is apparently close to being stood up).

In terms of radical growth in demand and defence spending across Europe, it is also highly probable that Irish enterprises would begin to increasingly show interest in pursuing export opportunities. The EU White Paper suggests pathways to strengthen the European defence technological and industrial base; stimulating research; and creating an EU-wide market for defence equipment which would certainly be relevant to Irish enterprises and future industrial governance. Regional EU ambitions to support EU Member State defence spending; EU defence funding initiatives; emphasis on supporting smaller Member States; and encouragement for the success of SMEs/start-ups and the dual-use sector are especially noteworthy for an Irish context. As are those announcements for military transformation not seen since the Cold War in markets such as the United Kingdom where Irish enterprises have traditionally been involved.

There would therefore seem to be a case that the existing civilian technology base and applied R&D/knowledge institutes for technological innovation would likely provide the highest potential for a small EU Member State like Ireland with a nascent, if not negligible, traditional defence industry. This is especially the case where there is growing emphasis in Europe on new technologies (such as AI, cloud and quantum computing, advanced and secure connectivity, autonomous systems and alternative energy sources) which are viewed as having capacity to fundamentally change the nature of warfare.⁸⁶ Similarly, defence R&D spending in Europe is understood to have more than doubled since 2016 where there is growing emphasis on this activity and defence R&T expenditure on account of technological sophistication of state actors in potential conflict scenarios.⁸⁷ In addition, the EU White Paper proposes that a higher share of increased defence spending should be invested in defence R&D and technology.⁸⁸ Notably, the Irish Defence Policy Review specifies that addressing current and emerging threats in the maritime and cyber domains, including hybrid threats, is the most urgent requirement in relation to Irish defence capability development ambitions. Moreover, and certainly in the case of the EU, SMEs are now viewed as having an increasingly important role in providing disruptive technologies and innovation, with the EU therefore taking actions to bring about more active contribution of SMEs to EU defence research and innovation (including, for example, providing EDF calls for SMEs, and encouraging their participation in other projects - for the period 2023-2027 it is estimated that the EDF should fund SMEs with up to EUR 840 million).⁸⁹ The EU Defence Industrial Strategy 2024 also lays out the EU's growing emphasis on fostering the potential of SMEs and technological innovation.

In Ireland, despite this potential and presence of an existing (civilian) advanced technology sector and high-tech SMEs whose products and services might be adapted for defence applications, it remains the case that many such enterprises might still be relatively unaware of the extent of the defence and security opportunity. The potential in the dual-use sphere is likely not yet fully realised. It is the case that prior engagements have been undertaken on EU opportunities by the Defence RTI unit and other government stakeholders. Yet, there is a likely need for government stakeholders to begin actively convincing or urgently communicating with Irish SMEs to become involved in the defence industry (as is the case in other comparator EU Member States) to seriously realise such opportunity and to grow the defence-related industry sector. By way of example, Cyprus (a neutral, EU Member State) began actively growing its ecosystem over ten years ago so that it is now successful in the EDF. Such a need to be proactive is also identified within the EU White Paper as applied to the European context. It is pointed out, for instance, that although Europe is considered to be a “technological powerhouse”, this does not yet mean that this has translated into a capacity to “fully leverage the potential of technology to gain military superiority” so that there is perceived urgency to mobilise overall EU innovation capacity and direct significant investments to regaining edge and prevent technological dependence.⁹⁰ In other words, the presence of advanced technology segments in Ireland does not automatically translate into military capability and opportunity. This will become even more pertinent to overcome where EU Member States are encouraged to progress towards procuring a minimum of 50 percent of their defence investments within the EU by 2030 and 60 percent by 2035.⁹¹

This logic of a need to proactively support Irish industry similarly applies to the Irish government's signing up to SAFE in 2025 - if it is hoped that Irish industry would indeed secure concrete benefits and opportunity. It is not clear that proactive mechanisms are yet in place to support Irish industry specifically in this regard (where SAFE is in fact an instrument that aims to both boost military capabilities and support European defence industry). The primary public narrative espoused in Ireland to explain the rationale for Government's signing up to SAFE seems so far to be on the benefits of the instrument to support more efficient Irish defence capability development. For example, through enabling the country to secure military equipment at lower cost and faster pace.⁹² Whereas "the instrument's specific purpose is to provide Member States with financial assistance, through loans, for 'urgent and major public investments in European defence industry aiming at a rapid increase of its production capacity'".⁹³

In any case, it should probably not be assumed that Irish businesses will as a matter of fact be presented with "valuable opportunities" by EU efforts to restock military supplies and increase defence cooperation as outlined in media and public memos.⁹⁴ This assumption should also be challenged where it is reported for instance that the Department of Finance judged that SAFE "has the potential to deliver opportunities for wider industry collaboration in defence applications for SMEs in Ireland".⁹⁵ This is especially pertinent where it is likely that smaller enterprises would not necessarily even have extensive resources and networks to pursue international opportunities. In fact, the European Defence Industrial Strategy finds that despite increases in defence budgets, significantly greater investment at national (and European) level is required to structurally adapt the EU industry to face the new security reality.⁹⁶ This will be critical in the Irish context where it is understood that small states, and especially those less-developed small states, have small domestic markets which are less conducive to economies of scale.⁹⁷

In all these cases, a comprehensive and transparent defence industrial policy regime would determine how Ireland intends to position the nation, as well as its enterprises both domestically and internationally. As would integrating answers to those questions posed in this report within the next Irish defence policy review.

Conclusion

Ireland's current defence posture is aiming to address critical capability gaps, not unlike many EU Member States in the current environment, but from the lowest base. Unlike the rest of Europe, the Irish government is not yet aiming to change course and implement the new European requirement for a posture which urgently enhances defence readiness and preparedness for high-intensity conflict scenarios to credibly deter armed aggression by 2030 with a view to securing peace. New European defence investment commitments of five percent of GDP annually from the NATO Summit, which include goals to strengthen innovation and the defence industrial base, are the new de facto norm across EU Member States. This means that Ireland is currently putting itself at risk of falling radically behind new European defence expenditure norms. While there are practical implementation difficulties for military

modernisation starting from the lowest base in Europe, the current policy to achieve LOA 2 by 2028 means that it is unlikely, without an urgent shift in official policy, for Ireland to achieve these new European norms of defence readiness by 2030.

Unlike Irish defence policy documents, the EU White Paper concludes that there is the need for a stronger and resilient defence industrial base as well as a technological innovation ecosystem for European defence industries to achieve military readiness. It clearly explains that the European defence industrial sector is an indispensable prerequisite of defence readiness and credible deterrence (as does the European Defence Industrial Strategy). European Council Conclusions of December 2023 lay out that in order to achieve such readiness and defend the Union, a strong defence industry is considered a prerequisite, requiring the European defence industry to become more resilient, innovative and competitive⁹⁸. Older Irish policy documents do make this obvious link between defence enterprises and capability development. Far more could be done though to both acknowledge and communicate that defence industrial allocations are critical to military transformation (whilst also functioning within the Irish military neutrality policy framework).

This report finds that there is growing interest in the Irish market given new plans for military transformation, but Ireland still has the smallest defence budget in the EU and one of the smallest in the world within an increasingly competitive global market. The Irish defence industry and defence industrial structures can be described as less developed, if not entirely undeveloped. There are a growing number of dual-use companies, and it could be surmised that Ireland has a fledgling defence and security-related industry. However, no sector mapping is available yet to understand the character and composition of the entire sector across each of the defence, defence-related/dual-use and applied R&D segments.

A patchwork of national policy documents provides some indication about the approach to defence industrial policy. Most industry-related attention has focused upon EDF opportunity and defence innovation. Yet, there are questions as to how capable Ireland is of gaining return on EDF investment, and it was viewed as comparatively unsuccessful within the European Defence Industrial Development Programme. There are, however, indicators of potential future progress through the recent establishment of relevant institutional structures such as the Defence RTI and Capability Development Units as well as Department of Defence restructuring.

The report concludes that it should not be assumed that increased national defence budgets translate into enhanced opportunities for Irish enterprises. It is also not a certainty that economic benefit accrues, where economic impact of defence spending or likelihood of GDP growth would depend on the type of expenditure and whether it is imported or produced locally. While there could be some domestic opportunity arising from major Irish defence procurements, Ireland has not developed defined defence industrial participation policy which would be needed to bring about a deepening or widening of the Irish defence industry, defence-related technology and R&D segments for Irish security of supply requirements.

Similarly, in terms of radical growth in demand and defence spending across Europe, it is highly probable that Irish enterprises would begin to increasingly show interest in export

opportunities. European military readiness initiatives would also suit domestic Irish capability requirements where they support the strengthening of national capability across the Union. Again though, it should probably not be assumed that Irish businesses will as a matter of course be presented with related opportunities. In particular, the presence of advanced technology segments in Ireland does not automatically translate into military capability and opportunity.

There would indeed seem to be a case that the existing civilian advanced technology base, SMEs and applied R&D/knowledge institutes for technological innovation would likely provide the highest potential for a small EU Member State like Ireland in the current and foreseeable climate. It remains the case though that such enterprises might still be unaware of the defence and security opportunity, and the potential in the dual-use sphere is unlikely to be yet realised. There is a likely need for government stakeholders to actively communicate and collaborate with Irish enterprises to become involved in the defence industry, as is the case in comparator EU Member States.

To conclude, less attention has been paid in the Irish context to establishing critical defence industry governance aspects or the necessary enhanced engagement to truly support the obviously symbiotic relationship with industry. A comprehensive and transparent defence industrial policy regime would determine how Ireland intends to position the nation's enterprises both domestically and within the European sphere for collective security. There is a once in a generation need for the fundamental redesign of the nation's traditional approach to defence industrial governance as a small, militarily neutral EU Member State. This will require change in defence industrial policy, established structures, and defence industry sector engagement.

References

Commission on the Defence Forces, Report of the Commission on the Defence Forces, (Ireland: Commission on the Defence Forces, 2022), <https://www.military.ie/en/public-information/publications/report-of-the-commission-on-defence-forces/>, accessed 1 April 2025.

Council of the EU, ‘European Council conclusions on European defence’, 146/25, 6 March 2025, <https://www.consilium.europa.eu/en/press/press-releases/2025/03/06/european-council-conclusions-on-european-defence/pdf/>, accessed 29 August 2025.

Council of the European Union, ‘Council Regulation establishing the Security Action for Europe (SAFE) through the Reinforcement of the European Defence Industry Instrument’, 2025/0122(NLE), 20 May 2025, <https://data.consilium.europa.eu/doc/document/ST-7926-2025-INIT/en/pdf>, accessed 29 August 2025.

De France, Olivier, Mampaey, Luc, and Zandee, Dick, ‘Defence Industrial Policy in Belgium and the Netherlands’, Policy Paper (October 2016), https://www.clingendael.org/sites/default/files/2016-02/Ares_%20Report_7_%20October_2016.pdf, accessed 28 April 2025.

Dee, Neil, and Heintz, Caitriona (Editor), ‘Taking Stock of Ireland’s Defence Industry’, Azure Forum Policy Report supported by IDSA (January 2022).

Department of Defence and Defence Forces, *Defence Policy Review 2024: Adjusting and affirming our Defence policy in an era of change* (Dublin: Department of Defence and Defence Forces, 2024), <https://www.gov.ie/en/publication/78a1f-defence-policy-review-2024/>, accessed 19 March 2025.

Department of Defence and Defence Forces Ireland, *Defence Enterprise Strategy* (Ireland: Department of Defence and Defence Forces Ireland, 2019), assets.gov.ie, accessed 24 March 2025.

Department of Defence and Irish Defence Forces, *Building for the Future – Change from Within: High Level Action Plan for the Report of the Commission on the Defence Forces*, 2022.

Department of Defence and Irish Defence Forces, *The Detailed Implementation Plan for the Report of the Commission on the Defence Forces*, November 2023.

Department of Defence, *Strategic Framework: Transformation of the Defence Forces*, September 2023.

Department of Defence and Irish Defence Forces, *Strategic Framework: Transformation of the Defence Forces*, Update Report, September 2023-April 2024.

Department of Defence and Irish Defence Forces, *Strategic Framework: Transformation of the Defence Forces*, February 2026.

Department of Defence and Irish Defence Forces, *Updated Detailed Implementation Plan for the Report of the Commission on the Defence Forces*, February 2026.

Department of Defence and Irish Defence Forces, *Department of Defence and Defence Forces Annual Report 2023*, October 2024.

Department of Defence, ‘Ministerial Brief Department of Defence January 2025’, January 2025.

Department of Defence, ‘Ministerial Brief Department of Defence’, December 2022.

Department of Defence and Irish Defence Forces, *Department of Defence and Defence Forces Strategy Statement 2025–2028*, September 2025.

Department of Defence, Irish Defence Forces and Vedette, ‘Feasibility Study: Establishment of a Research, Technology & Innovation Capability for the Irish Defence Organisation’, Final Report, September 2020.

[Department of the Taoiseach](https://www.gov.ie/en/department-of-the-taoiseach/publications/programme-for-government-2025-securing-irelands-future/), ‘Programme for Government 2025: Securing Ireland’s Future’, <https://www.gov.ie/en/department-of-the-taoiseach/publications/programme-for-government-2025-securing-irelands-future/>, accessed 15 April 2025.

Draghi, Mario, ‘The future of European competitiveness, Part A: A competitiveness strategy for Europe’, September 2024).

Draghi, Mario, ‘The future of European competitiveness, Part B: In-depth analysis and recommendations’, (September 2024).

European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *A new European Defence Industrial Strategy: Achieving EU readiness through a responsive and resilient European Defence Industry* (Brussels, 2024), JOIN(2024) 10 final, 5 March 2024.

European Commission, *Proposal for a Council Regulation establishing the Security Action for Europe (SAFE) through the reinforcement of European defence industry Instrument* (Brussels, 2025), COM(2025) 122 final, 19 March 2025.

European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *JOINT WHITE PAPER for European Defence Readiness 2030* (Brussels, 2025), JOIN(2025) 120 final, 19 March 2025.

European Commission, *Accommodating increased defence expenditure within the Stability and Growth Pact*, Communication from the Commission (Brussels, 2025), C(2025) 2000 final, 19 March 2025.

European Defence Agency, *Defence Data 2023-2024* (Brussels: European Defence Agency), <https://eda.europa.eu/docs/default-source/brochures/1eda---defence-data-23-24---web---v3.pdf>, accessed 3 April 2025.

European Defence Agency, *Defence Data 2024-2025* (Brussels: European Defence Agency), https://eda.europa.eu/docs/default-source/brochures/2025-eda_defencedata_web.pdf, accessed 15 September 2025.

European Parliamentary Research Service, ‘ReArm Europe Plan/Readiness 2030’, Briefing, April 2025,

[https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769566/EPRS_BRI\(2025\)769566_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769566/EPRS_BRI(2025)769566_EN.pdf)

Fine Gael and EPP Group in the European Parliament, 'Ireland and the EU: Defending our common European home', 2018.

Government of Ireland, *Action Plan on Competitiveness and Productivity*, September 2025.

Government of Ireland, Project Ireland 2040, *National Development Plan Review 2025 Securing Ireland's Future Sectoral Investment Plan: Defence*, prepared by the Department of Defence.

Hartley, Keith, and Belin, Jean (2021). *The Economics of the Global Defence Industry*. Routledge.

Heinl, Caitriona, 'Levelling up Industrial Strategy through Industrial Participation to Achieve Ireland's Foreign and Defence Policy Ambitions: A Primer', IDSA Policy Brief (September 2024).

Irish Defence Forces, *IRLJP-01 Military Doctrine for the Irish Defence Forces*, 2024.

Irish Defence and Security Association (IDSA), 'IDSA PRIORITIES & AGENDA', Caitriona Heinl (January 2025).

KildareStreet, Seanad Debates, Timmy Dooley, <https://www.kildarestreet.com/sendebates/?gid=2026-01-21a.19>, 21 January 2026.

Ploom, Illimar, Kalvet, Tarmo, and Tiits, Marek, 'Defence industries in small European states: Key contemporary challenges and opportunities', *Journal of International Studies*, 15(4) (2022), 112-130.

-
- ¹ The author is a Co-Founding Director of IDSA and Founder/Executive Director of the Azure Forum for Contemporary Strategy. The Azure Forum continues to provide policy and executive support to IDSA and through this support, the author has been an acting IDSA executive (July 2024-present). Opinions are the author's own.
- ² Ploom, Illimar, Kalvet, Tarmo, and Tiits, Marek, 'Defence industries in small European states: Key contemporary challenges and opportunities', *Journal of International Studies*, 15(4) (2022), 112-130.
- ³ Hartley, Keith, and Belin, Jean (2021). *The Economics of the Global Defence Industry*. Routledge.
- ⁴ Simon Brouder, 'Kerry firms carve out a niche in defence industry', https://www.independent.ie/regionals/kerry/news/kerry-firms-carve-out-a-niche-in-defence-industry/27397256.html?utm_source=chatgpt.com, 21 July 2010, accessed 12 May 2025.
- ⁵ Global Database, 'Defence & Security companies in Ireland', https://ie.globaldatabase.com/industry/defence-and-security?utm_source=chatgpt.com#more, accessed 12 May 2025.
- ⁶ Conor Gallagher, 'Is Ireland funding the military adventures of its European neighbours?', Irish Times, <https://www.irishtimes.com/news/ireland/irish-news/is-ireland-funding-the-military-adventures-of-its-european-neighbours-1.4860703>, 25 April 2022, accessed 9 June 2025.
- ⁷ Conor Gallagher, 'As Ireland seeks to upgrade its military, arms manufacturers take interest', Irish Times, <https://www.irishtimes.com/crime-law/2023/10/06/as-ireland-seeks-to-upgrade-its-military-arms-manufacturers-take-interest/>, 6 October 2023, accessed 12 May 2025.
- ⁸ Dee, Neil, and Heint, Caitriona (Editor), 'Taking Stock of Ireland's Defence Industry', Azure Forum Policy Report supported by IDSA (January 2022).
- ⁹ Irish Defence and Security Association. <https://defenceandsecurity.ie/>.
- ¹⁰ Department of Defence, 'Ministerial Brief Department of Defence January 2025', January 2025.
- ¹¹ Government of Ireland, *Action Plan on Competitiveness and Productivity*, September 2025.
- ¹² Heint, Caitriona, 'Levelling up Industrial Strategy through Industrial Participation to Achieve Ireland's Foreign and Defence Policy Ambitions: A Primer', IDSA Policy Brief (September 2024).
- ¹³ Ibid.
- ¹⁴ Ploom, Kalvet, and Tiits, 'Defence industries in small European states'.
- ¹⁵ Department of Defence and Defence Forces, *Defence Policy Review 2024: Adjusting and affirming our Defence policy in an era of change* (Dublin: Department of Defence and Defence Forces, 2024), <https://www.gov.ie/en/publication/78a1f-defence-policy-review-2024/>, accessed 19 March 2025.
- ¹⁶ Ibid.
- ¹⁷ Irish Department of Defence, 'Tánaiste Publishes Defence Policy Review', <https://www.gov.ie/en/press-release/d2102-tanaiste-publishes-defence-policy-review/>, accessed 1 April 2025.
- ¹⁸ Department of the Taoiseach, 'Programme for Government 2025: Securing Ireland's Future', <https://www.gov.ie/en/department-of-the-taoiseach/publications/programme-for-government-2025-securing-irelands-future/>, accessed 15 April 2025, 144.
- ¹⁹ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ²⁰ Ibid.
- ²¹ Ibid.
- ²² O'Connor, Niall, 'Ireland talking directly to other governments to quicken pace of buying military hardware', (27 August 2024), <https://www.thejournal.ie/ireland-to-use-faster-government-to-government-procurement-strategy-to-buy-defence-equipment-6469317-Aug2024/>, accessed 3 June 2025.
- ²³ Department of Defence, 'Support for Enterprise, Research and Innovation in Defence', <https://www.gov.ie/en/department-of-defence/publications/support-for-enterprise-research-and-innovation-in-defence/>, accessed 16 June 2025.
- ²⁴ Irish Defence Forces (2019, 30 December). 'Defence Forces Year in Review 2019', Defence Forces Year In Review Statement 2019, <https://www.military.ie/en/news-and-events/news-archive/2020/defence-forces-year-in-review-2019.html>, accessed 24 March 2025.
- ²⁵ Department of Defence and Defence Forces Ireland, *Defence Enterprise Strategy* (Ireland: Department of Defence and Defence Forces Ireland, 2019), assets.gov.ie, accessed 24 March 2025.
- ²⁶ Department of Defence, 'Support for Enterprise, Research and Innovation in Defence'.
- ²⁷ Ibid. This is achieved through the Defence Enterprise Committee overseen by the Defence Enterprise Coordination Committee and governed by the Defence Enterprise Governance Arrangements (V2 of April 2019).
- ²⁸ Department of Defence, 'Ministerial Brief Department of Defence', December 2022.
- ²⁹ Irish Defence Forces, 'INDUSTRY AND RESEARCH COLLABORATION', <https://www.military.ie/en/public-information/defence-research,-technology-and-innovation-rti-unit/industry-and-research-collaboration/>, accessed 16 June 2025.

-
- ³⁰ Department of Defence and Irish Defence Forces, *Department of Defence and Defence Forces Annual Report 2023*, 2024.
- ³¹ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ³² Department of Defence and Irish Defence Forces, *Department of Defence and Defence Forces Annual Report 2023*.
- ³³ Department of Defence and Irish Defence Forces, *Department of Defence and Defence Forces Strategy Statement 2025–2028*, September 2025.
- ³⁴ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ³⁵ Goldman Sachs, ‘How much will rising defense spending boost Europe’s economy?’, <https://www.goldmansachs.com/insights/reports/how-much-will-rising-defense-spending-boost-europes-economy>, 6 March 2025, accessed 7 May 2025.
- ³⁶ De France, Olivier, Mampaey, Luc, and Zandee, Dick, ‘Defence Industrial Policy in Belgium and the Netherlands’, Policy Paper (October 2016), https://www.clingendael.org/sites/default/files/2016-02/Ares_%20Report_7_%20October_2016.pdf, accessed 28 April 2025.
- ³⁷ Heintl, Caitriona, ‘Levelling up Industrial Strategy through Industrial Participation to Achieve Ireland’s Foreign and Defence Policy Ambitions: A Primer’.
- ³⁸ Department of Defence, ‘Ministerial Brief Department of Defence January 2025’, January 2025.
- ³⁹ Draghi, Mario, ‘The future of European competitiveness, Part A: A competitiveness strategy for Europe’, (September 2024).
- ⁴⁰ Draghi, Mario, ‘The future of European competitiveness, Part B: In-depth analysis and recommendations’, (September 2024).
- ⁴¹ Ibid.
- ⁴² Department of Defence and Defence Forces, ‘Strategy Statement 2023 – 2026’, 2023.
- ⁴³ Government of Ireland, *Action Plan on Competitiveness and Productivity*.
- ⁴⁴ Finnish Ministry of Defence, ‘Defence materiel and the defence industry’, https://www.defmin.fi/en/areas_of_expertise/defence_materiel_and_the_defence_industry, accessed 15 July 2025.
- ⁴⁵ Gallagher, Conor (2025, 28 February). ‘Ireland has ‘a lot of catching up to do’ on defence spending, says Simon Harris’, *The Irish Times*, <https://www.irishtimes.com/ireland/2025/02/28/ireland-has-a-lot-of-catching-up-to-do-on-defence-spending-says-simon-harris/>, accessed 16 April 2025.
- ⁴⁶ Fine Gael and EPP Group in the European Parliament, ‘Ireland and the EU: Defending our common European home’, 2018.
- ⁴⁷ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ⁴⁸ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *A new European Defence Industrial Strategy: Achieving EU readiness through a responsive and resilient European Defence Industry* (Brussels, 2024), JOIN(2024) 10 final, 5 March 2024.
- ⁴⁹ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ⁵⁰ Ploom, Kalvet, and Tiits, ‘Defence industries in small European states’.
- ⁵¹ KildareStreet, Seanad Debates, Timmy Dooley, <https://www.kildarestreet.com/sendebates/?gid=2026-01-21a.19>, 21 January 2026.
- ⁵² Ploom, Kalvet, and Tiits, ‘Defence industries in small European states’.
- ⁵³ Freedman, Lawrence, ‘The Great Crisis: Europe's military and diplomatic challenge’, Substack blog (4 March 2025), https://samf.substack.com/p/the-great-crisis?publication_id=631422&post_id=158362006&isFreemail=true&r=1qf9a7&triedRedirect=true, accessed 3 June 2025.
- ⁵⁴ Lunday, Chris, ‘NATO’s Rutte embraces 5 percent defense spending goal’, Politico (26 May 2025), https://www.politico.eu/report/mark-rutte-embrace-5-percent-defense-goal-nato-summer/?utm_source=substack&utm_medium=email, accessed 4 June 2025.
- ⁵⁵ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *JOINT WHITE PAPER for European Defence Readiness 2030* (Brussels, 2025), JOIN(2025) 120 final, 19 March 2025.
- ⁵⁶ NATO, ‘Defence expenditures and NATO’s 5% commitment’, https://www.nato.int/cps/en/natohq/topics_49198.htm, 27 June 2025, accessed 9 July 2025.
- ⁵⁷ European Defence Agency, *Defence Data 2023-2024* (Brussels: European Defence Agency), <https://eda.europa.eu/docs/default-source/brochures/leda---defence-data-23-24---web---v3.pdf>, accessed 3 April 2025, 5.
- ⁵⁸ SIPRI, ‘SIPRI Military Expenditure Database’, <https://milex.sipri.org/sipri>, accessed 4 June 2025.

-
- ⁵⁹ European Defence Agency, *Defence Data 2023-2024*.
See also: European Defence Agency, *Defence Data 2024-2025* (Brussels: European Defence Agency), https://eda.europa.eu/docs/default-source/brochures/2025-eda_defencedata_web.pdf, accessed 15 September 2025.
- ⁶⁰ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ⁶¹ World Bank Group, 'Military expenditure (% of GDP)', https://data.worldbank.org/indicator/MS.MIL.XPND.GD.ZS?most_recent_value_desc=false, accessed 4 June 2025.
- ⁶² Gallagher, 'Ireland has 'a lot of catching up to do' on defence spending, says Simon Harris'.
- ⁶³ Press Association (2025, 30 March). 'More than 6,000 modern body armour units to be acquired for Irish soldiers', *The Irish Times*, <https://www.irishtimes.com/ireland/2025/03/30/more-than-6000-modern-body-armour-units-to-be-acquired-for-irish-soldiers/>, accessed 17 April 2025.
- ⁶⁴ Department of Defence and Defence Forces, *Defence Policy Review 2024*.
- ⁶⁵ Wall, Martin, 'Simon Harris proposed doubling defence spending as 'step change urgently required'' (25 August 2025), *Irish Times*, <https://www.irishtimes.com/politics/2025/08/25/urgent-leap-in-national-security-funding-necessary/>, accessed 15 September 2025.
- ⁶⁶ Connelly, Tony, 'Europe to publish proposals to boost security and defence' (19 March 2025), RTE, <https://www.rte.ie/news/europe/2025/03/19/1502806-europe-defence/>, accessed 4 June 2025.
- ⁶⁷ Gallagher, Conor, 'Costings sought for massive expansion of Irish military including purchase of fighter jets', *Irish Times* (28 February 2025), <https://www.irishtimes.com/ireland/2025/02/28/simon-harris-tells-officials-to-cost-huge-military-expansion-including-fighter-jets/>?, accessed 11 August 2025.
- ⁶⁸ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *A new European Defence Industrial Strategy*.
- ⁶⁹ Wall, 'Simon Harris proposed doubling defence spending as 'step change urgently required''.
- ⁷⁰ European Parliamentary Research Service, 'ReArm Europe Plan/Readiness 2030', Briefing, April 2025, [https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769566/EPRS_BRI\(2025\)769566_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/769566/EPRS_BRI(2025)769566_EN.pdf)
- ⁷¹ Council of the EU, 'SAFE: Council adopts €150 billion boost for joint procurement on European security and defence', Press release (27 May 2025), <https://www.consilium.europa.eu/en/press/press-releases/2025/05/27/safe-council-adopts-150-billion-boost-for-joint-procurement-on-european-security-and-defence/#:~:text=Functioning%20of%20SAFE,a%20limited%20period%20of%20time>, accessed 27 August 2025.
- ⁷² Department of Foreign Affairs and Defence, "'Ireland 2026 – Looking towards our EU Presidency" - Remarks by the Minister of State for European Affairs and Defence, Thomas Byrne', Speech, 6 May 2025, <https://www.gov.ie/en/department-of-foreign-affairs/speeches/ireland-2026-looking-towards-our-eu-presidency-remarks-by-the-minister-of-state-for-european-affairs-and-defence-thomas-byrne/>, accessed 28 August 2025.
- ⁷³ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *A new European Defence Industrial Strategy*.
- ⁷⁴ European Defence Agency, *Defence Data 2023-2024*.
- ⁷⁵ UK Ministry of Defence and the Rt. Hon. Maria Eagle MP, 'Minister of State for Defence Procurement and Industry RUSI Speech', Speech (6 March 2025), https://www.gov.uk/government/speeches/minister-of-state-for-defence-procurement-and-industry-rusi-speech?utm_source=substack&utm_medium=email, accessed 12 August 2025.
- ⁷⁶ Connelly, Tony, 'Europe to publish proposals to boost security and defence'.
See also: Department of Defence, 'Ministerial Brief Department of Defence January 2025'.
- ⁷⁷ European Parliamentary Research Service, 'ReArm Europe Plan/Readiness 2030'.
- ⁷⁸ Conor Gallagher, 'Irish businesses could gain from EU rearmament, say Government memos', *Irish Times*, <https://www.irishtimes.com/ireland/2025/05/05/irish-businesses-could-gain-from-eu-rearmament-say-government-memos/>, 05 May 2025, accessed 14 July 2025.
- ⁷⁹ European Movement Ireland, 'Just the Facts | How does Ireland participate in EU defence?', *Just the Facts*, <https://www.europeanmovement.ie/just-the-facts-ireland-eu-defence/>, July 2025, accessed 28 August 2025.
- ⁸⁰ Irish Department of Defence, 'Policy: Defence', (last updated on 13 January 2025), *Defence.ie*, <https://www.gov.ie/en/department-of-defence/policies/defence/>, accessed 28 August 2025.
- ⁸¹ European Movement Ireland, 'Just the Facts | How does Ireland participate in EU defence?'.
See also: Houses of the Oireachtas, 'Statement by Committee on Finance, Public Expenditure, Public Service Reform and Digitalisation, and Taoiseach regarding proposed EU Regulations on funding Defence spending', Press Centre, <https://www.oireachtas.ie/en/press-centre/press-releases/20250715-statement-by-committee-on-finance-public-expenditure-public-service-reform-and-digitalisation-and-taoiseach-regarding-proposed-eu-regulations-on-funding-defence-spending/>, 15 July 2025, accessed 28 August 2025.
- ⁸² Dee and Heintz, 'Taking Stock of Ireland's Defence Industry'.

⁸³ Ibid.

⁸⁴ Conor Gallagher, 'Ireland receives just €11.6m in EU defence grants despite contributing many times that amount to fund', Irish Times, <https://www.irishtimes.com/ireland/2024/05/14/ireland-receives-just-116-million-in-eu-defence-grants-despite-far-bigger-investment-in-programme/>, 14 May 2024, accessed 9 June 2025.

⁸⁵ Department of Defence, 'Ministerial Brief Department of Defence January 2025'.

⁸⁶ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *JOINT WHITE PAPER for European Defence Readiness 2030*.

⁸⁷ European Defence Agency, *Defence Data 2023-2024*.

⁸⁸ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *JOINT WHITE PAPER for European Defence Readiness 2030*.

⁸⁹ Ibid.

⁹⁰ Ibid.

⁹¹ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *A new European Defence Industrial Strategy*.

⁹² Conor Gallagher and Martin Wall, 'Ireland backs €150bn defence plan as EU moves to rearm', Irish Times, <https://www.irishtimes.com/politics/2025/06/27/ireland-will-sign-up-to-eu-defence-initiative-as-bloc-moves-to-rearm/>, 27 June 2025, accessed 28 August 2025.

⁹³ European Parliamentary Research Service, 'ReArm Europe Plan/Readiness 2030'.

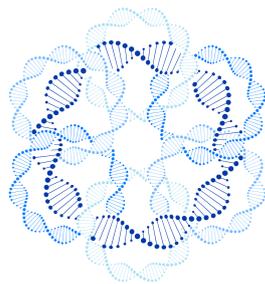
⁹⁴ Conor Gallagher, 'Irish businesses could gain from EU rearmament, say Government memos', Irish Times, <https://www.irishtimes.com/ireland/2025/05/05/irish-businesses-could-gain-from-eu-rearmament-say-government-memos/>, 05 May 2025, accessed 14 July 2025.

⁹⁵ Gallagher, 'Irish businesses could gain from EU rearmament, say Government memos'.

⁹⁶ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *A new European Defence Industrial Strategy*.

⁹⁷ Ploom, Kalvet, and Tiits, 'Defence industries in small European states'.

⁹⁸ Council of the European Union, 'Council Regulation establishing the Security Action for Europe (SAFE) through the Reinforcement of the European Defence Industry Instrument', 2025/0122(NLE), 20 May 2025, <https://data.consilium.europa.eu/doc/document/ST-7926-2025-INIT/en/pdf>, accessed 29 August 2025.



THE AZURE FORUM
FOR CONTEMPORARY SECURITY STRATEGY