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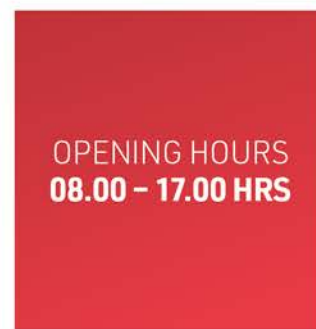


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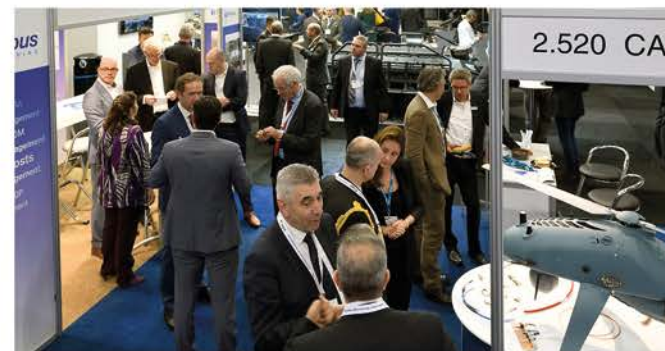
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NIDV DEFENCE & SECURITY
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From our Chairman

The NIDV Exhibition Defence and Security is about to start. We are delighted to welcome you to Rotterdam on November 20th, where we will be hosting the 36th edition of the NEDS.

This year's exhibition floor is the largest to date, bringing together more companies than ever before.

At the recent historic NATO summit in The Hague, member states decided to significantly increase defence investments with immediate effect. Rightly so, and hopefully once and for all, we are abandoning the naive assumption that the world around us is peaceful and that security is a given. Within the European Union too, collective efforts are under way to awaken societies to this new reality.

More than ever, our way of life and our freedoms are at stake, threatened by autocratic regimes at our borders seeking to undermine them through cyberattacks and drone strikes.

In a world where threats are evolving at unprecedented speed – both in terms of nature and scale – it is more important than ever that we gather here at this exhibition.

There is only one way to respond to these threats: by working together to swiftly create the conditions that will enable our collective industrial base to supply the armed forces of the NATO member states. The men and women serving in the armed forces deserve the very best equipment, which requires close cooperation between governments, industry and knowledge institutions, doing things that may not have been done before and thinking outside the box. The question isn't why it can't be done, but rather how we can make it possible.

May this NEDS play a decisive role in strengthening our defence industries through effective cooperation.



I wish you every success at the exhibition!

Raymond Knops
Chair of the board of NIDV

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Cover: The men and women of the armed forces units deserve excellent equipment. This requires close cooperation, doing things that may not have been done before, and thinking outside the box. The innovation pavilion during NEDS offers new parties a platform to present themselves to the international defence and security sector.
Photo: Mediacentrum Defensie

Run and stand still for companies

The Ministry of Defence urged Dutch industry to act quickly and support Ukraine, but the bureaucratic wheels in The Hague turned slowly. Because of delays within official channels, deliveries sometimes arrived too late: the Ukrainian army unit had already been cut off by the enemy, and the requested supplies could no longer get through. "People's lives were of course, at stake." The Ukraine Taskforce is now working to speed up procedures, and even the departmental auditors are on board. But another problem is looming: budgets are running out.

Text: Eric Vrijssen

Photos: Mediacentrum Defensie



Training of Ukrainian military personnel.

The Netherlands has allocated 13.6 billion euros over four years for military aid to Ukraine, of which 2.4 billion has been spent through deliveries from Defence's own stockpiles. More than 6 billion has been paid into international funds for weapons purchases here and, above all, elsewhere in the world. The remaining 5 billion is going towards defence equipment projects in which the domestic defence industry is playing an increasingly active role. Why did it take so long for the Netherlands to get involved, and how is the acceleration effort taking shape?

In a letter to the House of Representatives of the Netherlands, acting Defence Minister Ruben

Brekelmans wrote that he wishes to involve industry to the fullest extent in supporting Ukraine. Unfortunately, production capacity was 'not yet sufficient'. The minister did not offer an explanation for this, but the fact is that his department and, in particular, start-ups and innovative companies did not always fully understand each other.

After decades of budget cuts, the ministry has primarily been geared towards efficiency: the first question is always whether something can be done more cheaply. In addition, the Ministry of Finance exercises strict oversight, and the stringent rules of the Government Accounts Act apply. Payments can

only be made after thorough checks. The government does not take on the role of the entrepreneur; the risk essentially rests with industry.

This threatened to create a stalemate. Defence, Brekelmans wrote, is investing heavily in technological innovation and in the defence industry, but some companies hit a wall in The Hague. They were keen to invest and expand their production capacity, but were given no guarantee that Defence would place orders over multiple years. Meanwhile, the departmental audit service wanted to know every last detail. Was the company making excessive profits? Could it provide a bank guarantee?

Sometimes promising projects fell through and frustrated entrepreneurs walked away. But others threw caution to the wind and pressed on regardless – not for personal glory, but at their own risk. "Friends, family and fools," is how one of the entrepreneurs described the financiers of his projects in Ukraine. He is now supplying drones and one way effectors – highly sophisticated long-range weapons – to the embattled country. The contract he had to conclude with the ministry in The Hague to that end was only signed afterwards. Without such a contract, no bank would provide credit, so he had to finance everything in advance.

Innovation

Colonel Simon Wouda heads the Ukraine Taskforce at the Ministry of Defence. In January 2024, he travelled to Kyiv with the Chief of Defence, General Onno Eichelsheim. "He instructed me to stay on longer to look at the innovation taking place within the Ukrainian armed forces and to explore opportunities for cooperation with Dutch industry." The first trade mission to Ukraine took place in April last year, followed by a second mission in November of the same year. Wouda explains that during these missions, cooperation between entrepreneurs came about almost naturally. "Immediately after we departed from Schiphol, you could see connections forming between drone manufacturers, battery suppliers and software experts."

Earlier in 2024, the then Prime Minister of the Netherlands, Mark Rutte, and President of Ukraine, Volodymyr Zelensky, signed a 10-year bilateral security agreement, which included a provision that the countries would cooperate on an equal footing in the field of armaments. This accelerated developments, says Wouda. Since mid-2024, an increasing number of Dutch companies have been supplying the Ukrainian armed forces.



Colonel Simon Wouda heads the Ukraine Task Force at the Ministry of Defense.

However, in March 2025, a crisis-style meeting had to be convened in The Hague to speed things up further. The Task Force met with 25 companies, which were instructed to ship their goods by

1 November at the latest. Ukraine was urgently in need of the equipment.

A shipbuilder from the Rijnmond region was among those attending that meeting. He was under the impression that Defence would be signing contracts within two weeks, but in his case it took three months. His company builds 'interceptors' – high-speed boats used by the Marines for amphibious operations. "First, you discuss the supply package with Defence. Once that's agreed, you then have to go through the departmental audit procedures and the Central Government Audit Service (ADR). As these were urgent deliveries, staff had to work long hours. That drives up costs, which is why I included a mark-up percentage in my quote. In the private sector, ten percent is normal in such cases, but the ADR didn't just sign off on it."

The shipyard is a family-run business dating back to the 19th century and works extensively for the police, Rijkswaterstaat (Dutch Directorate for Public Works and Water Management) and the pilotage service. "We're not in it for quick profits," says the director. Since 2020, he has also been supplying Defence. Gradually, a relationship of trust has been developing with the department. Looking back, he feels "reasonably positive" about the way the process was handled. "At a certain point, I told them: guys, I've got a deadline of 1 November. If you want us to scale up production, then come through with the funding. Otherwise, we'll have to borrow working capital at 25 percent." The yard is now in full production for Ukraine. The 1 November deadline will only be partly met, meaning that some of the boats will be delivered slightly later.

Reflecting on the deal, the shipbuilder says: "It was perhaps a bit chaotic. Defence came to us with the question: what can you deliver? And our counter question was: what do you need? Fast delivery was essential, so we offered a standard product. We would have preferred it if the boats had had to meet more specifications, so that they would be even better suited for operational use." He hopes to receive feedback from Ukraine so that he can perfect the product.

"It's not down to a lack of goodwill from the people at Defence. "It's the procedures that slow things down," says a supplier of 'critical data solutions' whose name must remain undisclosed for security reasons. He observes that officials are pushing the boundaries of their authority to speed up assistance to Ukraine. At the start of this year, he delivered an initial batch of long-range weapons to Kyiv. He is now awaiting approval for a second consignment.



Dutch companies have been supplying to Ukrainian armed forces.

He explains: "You need approval from the Central Government Audit Service and the Finance and Control Directorate. Then it just gets stuck somewhere halfway. Suddenly it's the holiday period and then nothing happens for a while." He believes that the ministry's procedures and criteria are too rigid, as if procurement were still about buying standardised mass-produced goods. Ukraine, however, needs continuous updates of innovative weapon systems. "Often you develop ten different products, nine of which fail. But the tenth one is sublime." He argues that this should also be reflected in profit margins.

Moreover, the pace of orders is very uneven. "Sometimes you have to deliver at lightning speed, and then there's a long period with no orders at all. To stay afloat during those quiet spells, you need a profit margin of around 40 percent." But for Defence, that's not up for discussion.

Robotics

Many entrepreneurs supplying Ukraine have a military background. That helps, they say: "You have a better understanding of how the ministry works." Maurits Korthals Altes worked part-time with the

Royal Netherlands Army while studying. He studied engineering and took part in the Defensity College programme. At the Oirschot barracks, he worked on RAS: Robotics and Autonomous Systems.

In September 2021, he founded Intelic, a company that develops software for unmanned aircraft and vehicles. "That was six months before Russia invaded Ukraine," the young entrepreneur notes. Since then, things have moved fast. In April 2024, then Defence Minister Kajsa Ollongren visited Kyiv, where she was photographed with suppliers to the armed forces: 49 Ukrainians and three Dutch drone specialists – Bram Alkema (DeltaQuad), Stef Have (AEC Skyline) and Maurits Korthals Altes (Intelic).

He accepts that procurement procedures take time, even if that can sometimes be frustrating. Korthals Altes: "Some procedures are unnecessarily time-consuming. Approval has to move from one office to another, which meant that one delivery could not go ahead. The Ukrainian unit that urgently needed the equipment had, by then, been cut off by Russian forces. Lives are at stake, of course."

Korthals Altes employs 44 people and is in talks with investors to expand the software company. If he succeeds in raising sufficient funding, he expects to have at least 100 employees by the end of 2026. And in five years' time? "Then we'll be one of the largest software suppliers for defence drones in Europe."

Crucial to this is collaboration with the end user, i.e. the soldiers close to the frontline. They are engaged in a high-tech arms race with the enemy, which means the software of unmanned systems constantly has to be adapted. The brutal reality at the front demands direct contact and continuous

That's why he doesn't want to be too dependent on The Hague and is also targeting foreign customers. "Many companies are fixated on security of supply with Defence, but the Netherlands is simply too small a country for that. For two years, the debate was dominated by security of supply. During that time, the so-called 'ecosystem' of Dutch industry didn't make a dent. But entrepreneurs shouldn't depend on government support. Dependable support may feel comfortable, but in the meantime your capacity to innovate quietly erodes. Before you know it, you're being overtaken by foreign competitors with more nerve."



Outgoing Minister of Defense Ruben Brekelmans visits Ukraine.

updates. Constant refinement and innovation keep you ahead of the enemy, and ahead of potential competitors.

Springboard

This is the view shared by all the entrepreneurs working with the Ukraine Taskforce. The equipment is tested under wartime conditions and continuously modified. Once the systems are 'battle-proof', NATO countries can also make better use of them – and your market position improves.

Korthals Altes: "Defence is a fantastic client. It's a springboard for your business." He certainly doesn't have any complaints about security of supply. "When you supply to the government, you always run the risk of the budget suddenly running out. Defence isn't there to keep businesses afloat."

Korthals Altes admits that a software company is, by nature, more flexible than a firm that has to keep large-scale physical production lines profitable. Such companies require extra certainty before they invest. But, according to the Intelic CEO, that certainty can also be found by seeking customers abroad, and then you don't need guarantees from The Hague.

Annoying

In 2021, a lieutenant colonel from the infantry of the Royal Netherlands Army switched to the private sector to become the director of the Dutch branch of a fast-growing Eastern European manufacturer of autonomous unmanned ground vehicles. This year, the former lieutenant colonel signed two contracts with the Ukraine Taskforce. He cannot disclose details of specific weapon platforms or numbers,

but from next year, the company will also open a production line in the Netherlands.

Delays at the ministry are annoying. "But you know the drill," he says with a grin. As a former officer, he understands that obtaining approvals simply takes time. "You have to manage expectations," he advises. "Always be fair and transparent. That served me well in the military, and it applies in business too."

While negotiating with the Taskforce, he held weekly meetings with the Central Government Audit Service and the Finance and Control Directorate. "They want to shift all the risk onto us, and we want to deliver the best possible product," he says – in the matter-of-fact tone of someone who knows that's simply how the game is played. On one occasion, delays occurred because departmental divisions failed to pass project plans on to each other in time. "In the end, the Taskforce helped iron out all the bureaucratic wrinkles and the delivery deadlines were pushed back slightly. The entire Materiel and IT Command organisation deserves a lot of credit, as they were very accommodating."

With some financial juggling, he arranged pre-financing for the project through his regular bank. "Otherwise, you have to ask Defence for an advance, which requires bank guarantees – and then everything grinds to a halt." Naturally, he had tough discussions with Defence about his profit margin. By his own admission, he was completely open about what his company wanted to get out of the deal, and he understood the ministry's position: "No one wants a repeat of the COVID PPE scandal, when a handful of entrepreneurs pocketed tens of millions in excessive profits. There has to be a balance between the risks you take as a company and the profit you make."

Companies involved are not allowed to disclose their profit margins, and Defence itself won't say what it considers reasonable, not even in approximate terms. That's understandable: if Defence were to suggest a maximum margin, suppliers would immediately treat it as a minimum and use it as the starting point for negotiations. Everyone, however, points out that innovative Ukrainian companies are allowed to apply far higher profit margins than are considered normal in the Netherlands.

Picking up the pace

Colonel Simon Wouda stresses that his Ukraine Taskforce wants to accommodate businesses as much as possible. He acknowledges that getting projects approved by the audit service and departmental controllers takes time. But the alternative is to go through European procurement procedures,

and that takes even longer. To speed things up, orders are awarded on a 'single-source' basis. For contracts above 2.5 million euros, an audit is mandatory. If a company requests an advance payment of 50,000 euros or more, Defence requires a bank guarantee. Wouda emphasises that his organisation has become more flexible. In an increasing number of cases, financial audits and bank guarantees can be waived, particularly if the company has previously supplied Defence.

Auditors from the Central Government Audit Service travelled to Ukraine to assess the books of local companies. Some firms failed to meet the required standards, but when the products were crucial for frontline operations, operational necessity prevailed.

He explains that his Taskforce was constantly approached by dubious companies hoping to make a quick profit by offering cheap foreign materiel at extortionate prices. It's understandable, he says, that he needs to confirm whether their asking price is in line with the market. He also relies to some extent on his gut feeling when assessing companies, by visiting their premises and taking a walk around the shop floor. "What do I find when I get there? Is this a family-run business buzzing with energy? Do the staff come across as committed and professional? If so, the company gets the benefit of the doubt."

Does that give established defence firms an unfair advantage, while start-ups are written off because their hipster CEO happens to wear his hair in a ponytail? If that's the case, Defence risks missing out on key innovations because it's being swayed by the wrong kind of signals. "No, on the contrary," says Wouda. "Start-ups often show more commitment and flexibility than established companies. We look straight past that ponytail, as what matters is the reliability of the product."

Wouda acknowledges that young companies often struggle to pre-finance their work, and Defence only pays once the goods have been delivered. Wouldn't it make sense to introduce a system of staged payments during the design and production phases – just as you pay instalments to the contractor during the construction of a new house?

Learning process

We're not there yet. Colonel Wouda and his colleagues are working on an alternative arrangement for companies that can't obtain a bank guarantee. "In those cases, Defence acts as the guarantor itself. The Ministry of Finance has to approve this every

time, but if we present the right arguments – namely the operational importance of the delivery – finance usually agrees.” This process does take some time, Wouda admits, but he says he can “escalate” when necessary. Important orders need to be issued quickly, so he applies extra pressure to make sure they move forward.

When companies are grinding their teeth over delays, it’s often not a matter of unwillingness on Defence’s part, but rather a lack of awareness. Wouda: “Often, we simply don’t know that a supplier is struggling with delays.” He advises entrepreneurs to keep the various departments of the ministry informed from the beginning. “Defence is going through a learning process,” says Wouda. He adds that understanding of suppliers’ positions is improving. “We’re getting better at anticipating problems. If necessary, we can escalate.”

The risk of corruption cannot be ruled out in a country like Ukraine, but the Taskforce keeps a close watch. The audit service scrutinises the accounts of Ukrainian companies, while two military attachés at the Dutch embassy in Kyiv carry out random checks to verify that everything is in order. The quality of the materiel is not assessed by the Netherlands, but by the Ukrainian armed forces. In the early stages, large quantities of weapons and ammunition from Turkey, the Czech Republic and other NATO countries were shipped to Ukraine at Dutch expense. It was impractical to transport all this materiel to the Netherlands first for inspection by TNO, the national research organisation. Instead, the Ukrainians carried out their own quality checks – and still do so today. Unlike the United States and some European countries, the Netherlands does not impose geographical restrictions on the deployment of donated weapons. Drones and other long-range weapons may therefore be used deep inside Russian territory. Cluster munitions and other weapons that are controversial under international law are not supplied.

One-off funding

The key challenge for Dutch companies is security of supply. Wouda says he would like to secure contracts for long-term deliveries to Ukraine, but having practically exhausted his budget, the process has ground to a halt. The Rutte IV Cabinet and the Schoof Cabinet (a caretaker government) made billions available, but this was one-off funding as opposed to a permanent, structural line in the defence budget.

When US arms deliveries largely dried up and Ukraine’s need grew urgent, the Schoof Cabinet

brought forward funds from the 2026 and 2027 budgets, spending these billions in 2025. It will be up to the next cabinet to allocate new budgets to support the threatened country. Since coalition negotiations can drag on, clarity on this issue isn’t expected until well into 2026.

Wouda is therefore bracing for a sudden interruption in deliveries: “This year there’s a huge spike, but by the second quarter of 2026 it falls off completely. Of the 25 companies we spoke to at the March meeting, just over half were able to sign a contract. Those contracts run until the middle of next year. If a new cabinet doesn’t release additional funds until the Spring Memorandum (around June), those companies could run into problems.”

They finally have production capacity, only to see demand for their products suddenly evaporate. At VDL’s former car plant in Born, for example, drone manufacturing is now in full swing. Around the turn of the year, ‘Born’ will be operating at maximum capacity, however continued funding is essential to keep donating drones to Kyiv in the coming years.

A temporary halt in deliveries would be a setback for both Ukraine and the Netherlands’ own defence. Colonel Wouda refers to the ‘Build with Ukraine’ programme, through which companies from both countries collaborate, even moving production lines to the Netherlands. “These direct contacts bring work and knowledge here. It’s a win-win situation.”

More recently, deliveries to Ukraine have increasingly been bundled with procurement for the Dutch armed forces. This helps reduce costs, while giving military personnel and suppliers a better insight into the latest developments at the front – improving their understanding of contemporary warfare. An interruption in deliveries therefore also affects national defence.

In theory, the caretaker cabinet could, in consultation with parliament, release additional funds in early 2026. Political support for aid to Ukraine is broad. The tricky part is that there is a false perception that there’s still plenty of money lying around. In recent years, Defence has had to spend huge sums – in July alone, another half a billion euros’ worth of US Patriot Systems for Ukraine was pledged – leaving the impression that the coffers were bottomless. But from next year, it will be a matter of scraping resources together, and it may take some time before everyone adjusts to that new reality. ●

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The key to success is working together

GKN Aerospace is a major player in the global aerospace and defence industry. Its ties with the Netherlands have always been strong, and European cooperation is a must. "Ultimately, what really matters is working together."

Two locations

- GKN Aerospace operates worldwide with 16,000 employees and more than 30 sites. Defence activities account for around 30 percent of the company's overall business.
- In the Netherlands, the company has two major sites in Hoozeveer and Papendrecht, employing nearly 3,500 people in total.
- It works closely with Dutch partners, research institutes and the government.
- The Fokker spirit, along with its knowledge and expertise, remains an important foundation within GKN Aerospace. Since the acquisition of Fokker Technologies in 2015, this expertise has been integrated into the organisation and plays a central role in technological development.
- Hoozeveer is home to the Global Technology Centre, where groundbreaking R&D work is being carried out in the field of composites and wiring systems.

Text: Riekelt Pasterkamp

GKN Fokker is a supplier of technologically advanced aircraft systems and components for the aviation industry and was founded by aviation pioneer Anthony Fokker more than 100 years ago. The company is part of GKN Aerospace, one of the world's largest aerospace suppliers.

and the resulting implications for the Dutch defence industry. This also includes the energy transition and digital transformation, already identified as essential in the Draghi report. The challenges are so great that no single European country can tackle them alone, which is why genuine cooperation is crucial. The Netherlands can play a fundamental role here, but that means making decisions and positioning itself early, as it did with the F-35."

"Major aerospace players such as Airbus and Lockheed also recognise and appreciate the value of our technology. For example, GKN Fokker and Airbus Helicopters signed a new agreement during the recent state visit by King Willem-Alexander and Queen Máxima to work together on advanced systems and composite technology for the H225M helicopter, with the aim of strengthening European defence cooperation. Alongside major programmes for the Netherlands, such as F-35, Apache and NH90, parent company GKN Aerospace is also actively involved in the development of Swedish fighter jet Gripen and Eurofighter Typhoon – demonstrating that we are a trusted partner."

Strategic decisions

Karel sees a clear role for GKN Fokker when it comes to cooperation within the aerospace ecosystem. "In this new reality, government, academia and industry need to join forces and make clear decisions regarding production and innovation. What do we want? With whom? And how will we achieve it?"

Answering these questions will require a clear industrial policy, which Karel expects the government to provide. "We are at a crossroads, facing a number of challenges regarding European defence cooperation

National pride

Karel would also like to raise one more point: "The Netherlands should be prouder of its aerospace cluster. We are involved in the largest programmes in the aerospace domain, yet in Southern Europe,

"Traditionally, the air force sector has been heavily focused on the United States," says Michel Karel, Vice President for Defence Netherlands at GKN Fokker. "We occupy key positions in programmes such as the F-35, the Apache combat helicopter and the Chinook transport helicopter – and we will increasingly adopt a more European mindset and approach. And yes, it can be done."

Photo: GKN Fokker



Michel Karel: "We are a trusted partner."

The NH90 maritime helicopter in action.



Photo: Mediacentrum Defensie



Photo: Riekelt Pasterkamp

The original Fokker D.VII returns to the Netherlands.

Fokker D.VII

A remarkable piece of Dutch aviation history: an original Fokker D.VII, which is being returned to the Netherlands after a mysterious 85-year journey, is now on display at the National Military Museum in Soesterberg. This First World War fighter aircraft flew with the Dutch Naval Aviation Service before 1940. During the Second World War, the aircraft disappeared without a trace, presumably destined for Hermann Göring's planned German Reich Aviation Museum.

In 1945, American soldiers searching for looted art treasures discovered a Fokker D.VII, among other items, in a barn in Vilsbiburg. They entrusted the aircraft to the Deutsches Museum in Munich. In 1980, restoration work in Germany revealed the Dutch national markings (roundel) and a registration. The aircraft will be on display at the National Military Museum for a period of five years.

aviation is seen as 'our' industry, while the products are 'theirs'. It's as if we're too modest to say it out loud. But the Netherlands has a leading role to play, and we should make that clear. In the aerospace cluster, where we always operate as part of a chain, we are a key partner in major international defence programmes."

Karel would like to see the Netherlands establish a defence research institute. "It could be a place where knowledge, industry, defence and education come together, built around a clearly defined agenda, backed by a budget of one billion euros and with goals covering fundamental and applied

research as well as product development. In such an institute, it would also be possible to anticipate needs that have not yet emerged. At present, the approach is still too fragmented and there is a reluctance to invest in something that isn't yet a mature product, which makes things difficult."

Today's wars are being fought right in Europe's backyard. Karel: "You can see that the battlefield in Ukraine is adaptive. What's needed at the front is developed by research institutes and produced by industry. Drones are a prime example – the engineers are effectively looking over the soldiers' shoulders." ●

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A new impetus for international cooperation

On 27 August 2025, the Netherlands Enterprise Agency (RVO) and a cluster of 27 Dutch companies – united under the Dutch Coalition for Defence and Security (DCDS) Finland – signed a cooperation agreement under the Partners for International Business (PIB) programme. This public-private initiative aims to position the Dutch sector as a reliable provider of high-quality technological solutions for Finland's defence system. The NIDV acts as coordinator of this PIB.

Text: Eveline Bos

Opportunities

Since Finland's accession to NATO in 2023, the country has been actively integrating into the NATO defence ecosystem. This presents tangible opportunities for Dutch companies and knowledge institutions already working in line with NATO standards. Moreover, the cooperation between the two countries is already built on the Northern Naval Capability Cooperation (NNCC) initiative, in which the Netherlands plays a leading role. Within this framework, collaboration takes place in the fields of innovation, joint procurement and maintenance of maritime systems. There are also opportunities for cooperation in other domains, including aviation (F-35), land systems, cybersecurity, security and surveillance – at sea, on land and in the air, including monitoring of the seabed. In addition, the European Defence Fund (EDF) provides scope for joint innovation projects between Dutch and Finnish parties.

Programme

A PIB is a three-year public-private partnership between industry and the Netherlands Enterprise Agency (RVO), implemented on behalf of the Ministry of Foreign Affairs. The programme helps companies and knowledge institutions strengthen their position in foreign markets. The Dutch embassy in the partner country plays an active role in this process. A local liaison is often appointed to coordinate activities and connect com-

panies with relevant stakeholders in the defence and security sector – which is also the case for Finland. Trade missions, exhibition visits and matchmaking events form an integral part of the programme.

The first activity within the PIB Finland, the Finnish-Dutch Industry Days, took place in Helsinki in early October. In total, more than sixty companies – over thirty of them Dutch – participated in the event, which featured a plenary programme as well as targeted matchmaking sessions and company visits. Both countries' Ministries of Defence were present to share their ambitions for the cooperation. All in all, it was a strong start to the programme, resulting in a solid foundation for further collaboration.

Difference

According to Peter Huis in 't Veld, Business Development Manager for International Affairs and PIB Coordinator at the NIDV, participation in a PIB programme gives companies a significant advantage.

"There is a big difference between a company trying to gain a foothold on its own and one doing so as part of a delegation with government support," he emphasises. With the support of the Dutch government and the active role of the embassy, companies can increase their visibility and present their products and services at the right level.



Photo: RVO

On 27 August 2025, the Netherlands Enterprise Agency (RVO) and the Dutch Coalition for Defence and Security Finland signed a cooperation agreement.

Cooperation with Finland is not only economically valuable, but also represents a strategic investment in security and innovation. Through the combined efforts of government and industry, the two countries are building a future-proof defence infrastructure in which the Netherlands and Finland reinforce one another.

Simon van der Burg, Ambassador of the Kingdom of the Netherlands to Finland, states: "Security policy and defence have always played a central role in the work of embassies. Russian aggression in Ukraine and hybrid attacks in Europe have made this part of the work even more important. Cooperation within this PIB goes beyond the economic domain – we are

building bridges between our defence industries and our governments – to work together towards a future-proof security infrastructure on our continent. We look forward to achieving this successfully together with our public and private partners."

Alongside Finland, PIBs focused on defence and security are also in place for Greece and South Korea. Work is currently underway on PIB programmes for Sweden and the Baltic States, further expanding the international reach of this sector. In doing so, these initiatives also strengthen the much-needed European cooperation in the field of defence and security. ●

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Unmanned and on a mission

In early 2025, the Royal Netherlands Navy launched the Maritime Uncrewed Programme, aimed at accelerating the deployment and further development of uncrewed systems – not as an end in itself, but to strengthen the Navy’s operational capabilities. Programme Director Bas Buchner explains: “What we’re working on is a combination of immediate action and driving development, while simultaneously establishing a long-term vision.” NIDV spoke with him and three companies that are developing uncrewed systems for operations on, under and above water.

Text: Eveline Bos

Within the Maritime Uncrewed Taskforce, led by Buchner, operational and technical specialists from across the entire maritime defence chain are working together to shape the programme. The approach is based on a system-of-systems: various types of uncrewed systems – operating under, on and above water – around larger, partially manned platforms. This combination offers significant operational advantages: the extended range and powerful sensors on manned vessels, combined with the mass, flexibility and rapid innovation cycles of uncrewed systems.

Program Director Bas Buchner.



Photo: own photo

Deployment

Uncrewed systems are currently used mainly for situational awareness and understanding. But the Taskforce is looking beyond that. To achieve deterrence and real operational impact, these systems need to be deployed in different ways. “Uncrewed is not a goal in itself. We need to deploy uncrewed systems for things that are dangerous, difficult and decisive,” says Buchner. These three criteria indicate where uncrewed systems make the greatest difference: keeping personnel out of harm’s way, performing tasks that are too complex or too fast for humans and delivering maximum impact in combat situations.

The Taskforce has started sketching out a vision for the future: what will different warfare areas look like in 2035? What will mine countermeasures look like? What about anti-submarine warfare? “To answer these questions, we’re developing a range of operational concepts that involve crewed platforms and various types of uncrewed systems. This makes it clear which specific capabilities are required, and in what numbers. For some systems, we won’t need many, but for others, such as one-way attack drones, we’ll need far more. That makes our message to industry more concrete. We’re not only defining the applications we expect to see in the near future, but also the volumes,” the Programme Director explains.

Collaboration

This transition requires a different, closer form of collaboration with industry and knowledge institutions – and it demands adjustments from all parties. From the very start, industry needs to be involved in shaping Defence’s vision. That way, development can happen jointly, with a clear understanding of the shared goals. Industry can then focus on Defence’s objectives, ensuring that systems truly work within

Demcon unmanned systems

Demcon unmanned systems, part of the Demcon Group, focuses entirely on unmanned, autonomous maritime systems. “By definition, we don’t design or build anything that has people on board,” says Fedor Ester, Managing Director at Demcon unmanned systems. “It’s 100 percent unmanned – no personnel on board, only ashore.” In the segment for vessels up to 24 metres, the company offers a complete solution, from design and construction to in-house software and full integration with other systems. Collaboration with Defence accelerated with the launch of Dutch Naval Design (DND). Companies within this initiative are working together on various developments, such as an Unmanned Surface Vessel (USV), intended for deployment from the new ASW frigates. “These are now short, cyclical development programmes that we are tackling together with a consortium. It took some getting used to at first, but by now the cooperation is working well, even between competitors. “You have to build that trust together first,” says Fedor. “It’s great to see Defence entrusting these development projects to the Dutch maritime manufacturing industry. The expertise is definitely there.”

Focus

Demcon unmanned systems is currently focusing primarily on the Royal Netherlands Navy, aiming to work with Defence as both a knowledge partner and supplier. “We want to do this in two areas: technology development for autonomous navigation and the construction of various unmanned platforms,” Fedor explains. “Through DND (Dutch Naval Design), we’re already starting to get that to land with Defence, and we have high expectations from the various initiatives, such as the Maritime Uncrewed Taskforce. There’s now a lot of attention on unmanned vessels, whereas previously the focus was mainly on aerial drones above water.”

The platforms developed by Demcon Unmanned Systems have already proven their worth in the civil market, for example in inspection, hydrography and environmental monitoring. The challenge lies in the size range the company focuses on: everything must fit within platforms from 1 to a maximum of 24 metres, depending on the

goal, while remaining robust and reliable. “We provide a solid platform and excellent support. The user – civilian or military – can connect their own sensors or payload. Naturally, we ensure the complete system is properly integrated.”

Collaboration

Interest in unmanned systems is growing, both within Defence and industry, although that interest isn’t always concrete yet. “There needs to be clarity about what exactly is needed within the Navy’s operational concepts,” says Fedor. “Which systems, and in what numbers? Right now, everyone is in a bit of a holding pattern. Will an order actually be placed after a development programme? Can we justify further investment in our production capacity?” The Maritime Uncrewed Taskforce, led by Bas Buchner, is currently working out those operational needs. “The next step will be to determine how industry can align with them.”



Photo: Sjoerd van der Huch

“Rapid scalability of production is a challenge, especially when uncertainties remain, but there are solutions. Within the Demcon group, and together with other Dutch parties, we can quickly switch to large-scale production. That also fits in neatly with the government’s philosophy of strengthening the Dutch maritime manufacturing industry.”

For Fedor Ester, one thing is clear: unmanned surface systems are here to stay. “In the future you will see a combination of (low) manned, unmanned and autonomous systems – on, under and above water – all of which must be able to work together. We are happy to be part of that development, because ultimately we supply these tools to Defence to help protect our democracy and freedom.”

the operational concepts. Bas Buchner also highlights the importance of stronger collaboration between companies within Dutch industry itself. "Let companies focus on what they're really good at. We need to start thinking more in terms of partnerships between Defence and industry rather than a purely transactional relationship." Buchner is optimistic: "Once the objectives are clear, collaboration and knowledge sharing between the parties becomes much easier."

Challenges

Unmanned systems in the maritime domain are technically complex. Wind, waves, salt and the absence of fixed reference points make things difficult. And then there's another major challenge: ensuring secure communication between these systems. Buchner warns: "The key challenge for the next five to ten years will be communication between all these systems that need to work together. Because of course, the trick will be to disrupt either

the communication or the positioning." What happens if connections are lost? How much autonomy should the systems still have in that situation? These are essential questions for both system design and deployment.

The Royal Netherlands Navy is expected to grow from a small, experimental layer of small unmanned systems into a mature *system-of-systems*: a mix

of crewed, uncrewed and autonomous platforms working together across multiple domains and with partners. This will take time, standardisation, extensive testing and, above all, the courage not to wait until everything is perfect all at once. "In the military, the attitude of 'everything must work perfectly the first time' is an important trait," says Buchner. "But in innovation, that can work against you."

High Eye

"We saw a gap in the market for systems that can land and take off vertically," says Joost de Ruiter, CEO and founder of High Eye. "You've got small electric multicopters and large unmanned systems, but not much in between. We wanted to fill that gap with an unmanned helicopter with a small footprint, specifically designed for the maritime domain."

Since 2013, High Eye has been developing compact, fuel-powered helicopters that can operate at sea and land on moving platforms. Conditions at sea are challenging: strong winds, salt and constant motion. "If the system can fly over the sea, it can fly over land too. But our focus remains primarily maritime."

Airboxer

High Eye's flagship product is the Airboxer: a fully automated aerial platform capable of carrying up to 7 kilos of payload. "The user determines what that payload is," explains Joost. "We ensure seamless integration. This must be done precisely, because the payload is not suspended below the centre of gravity and the system needs to remain properly balanced. The engine also causes vibrations, so effective damping is essential. Once everything is set up correctly, it's plug and play." The Airboxer is used for reconnaissance missions (situational awareness and ISR), for example by Defence, the Coastguard or in the offshore industry. Thanks to its fuel-powered propulsion, the system can fly for up to four hours at a

cruising speed of 75 km/h. The maximum speed is 130 km/h. "If you want to fly for longer, you simply can't avoid using fuel," says De Ruiter. "One small advantage of using fuel is that the aircraft weighs less as the flight goes on."

Collaboration

The company has been in contact with Defence for years. "There's been interest from the very beginning," says De Ruiter. "But sometimes the process is too slow. We're currently working on an order, but there was a six-month gap between the confirmation and the actual contract. In that time, an improved version of the radio came out. We're now buying that one, but at the expense of our margin."

He advocates for a different approach. "A better way would be to build long-term partnerships with trusted partners. That would prevent situations where, because of lengthy procurement procedures, the system is already outdated by the time it's delivered. It would also enable Defence and industry to develop systems jointly, ensuring that what we build works within the Navy's operational concepts. Programmes such as SDIR (Strategic Defence Innovation Research) are good steps in that direction. We're now also participating in one of these development programmes with the Royal Netherlands Navy."

Scaling up

As a scale-up, High Eye is in a crucial phase. However, financing presents a challenge. "For start-ups there are usually plenty of innovation funds, but for scaling up there's very little. In defence contracts, scale-ups are generally only paid after delivery, but an upfront investment is required to purchase components – often 50 percent. Banks or investors want to see a signed

contract before they provide credit. However, if the company only starts ordering and making advance payments after the contract has been signed, the delivery schedule will be jeopardised. An advance payment would make a huge difference. That's a sensitive issue for the government, but with the right mechanisms, you can limit the risks. New initiatives such as SecFund or RDA* investments, are, as far as I'm aware, based on equity investments, and these are, of course, slow processes. What's more, most entrepreneurs aren't looking for new shareholders; they're looking for working capital financing."

Compact

The Airboxer has a small footprint: an area of 4x4 metres is sufficient for take-off and landing. Components can easily be replaced on board. "You can replace an engine within two hours. All you need is a table and a few simple tools." Flight training takes three weeks, and the Airboxer can be deployed and flown by two people. "It's a compact solution in every respect," says De Ruiter.

He is optimistic about the future of unmanned systems. "I expect that in the future, naval vessels will have multiple unmanned systems on board alongside manned helicopters. That gives you flexibility and efficiency." With all those systems operating in the air and on water, communication becomes increasingly challenging, but it also creates new opportunities. "At the moment we use radio, but 4G or satcom are options as well. AI can also play a major role here. "Looking at how far we've come over the past five years, I'm really curious to see what lies ahead. The market is developing at a tremendous pace."

*Regional development agencies



Photo: High Eye



Wilbert Versteeg (right) and Coen Tolkamp from UBW Naval. Photo: UBW Naval

U-Boat Worx Naval

For twenty years, U-Boat Worx has been building manned submarines for the leisure and tourism market. Think compact subs with two to nine seats, used on superyachts and cruise ships. Today, 37 of these submarines are in operation worldwide, most of them maintained – or fully operated, including pilot and technicians – by U-Boat Worx itself. Since the beginning of this year, the company has charted a new course: the defence market. And it's a logical step.

Supersub

"We developed a 'supersub' for one of our existing clients," says Wilbert Versteeg, CEO of U-Boat Worx. "It's faster and more manoeuvrable than anything currently in our portfolio. Those capabilities, also open up possibilities for applications such as search and rescue operations. A sub like this can be launched quickly, allowing two or three people to descend to observe or even retrieve objects using robotic arms."

This development prompted the creation of a dedicated defence division: UBW Naval. Wilbert Versteeg and Coen Tolkamp together form the management team of this new division. The company is now working on becoming ABDO-compliant, which is an important step towards collaborating with defence partners.

The military application of its civilian sub technology looks promising. "We're seeing a lot of interest, both nationally and internationally," says Versteeg. "Most of the requests are coming from Europe." The move from the civilian to the defence market is proving quite manageable in practice. "Our submarines already meet stringent standards, such as DNV certification," explains Tolkamp. "We are used to working to high quality standards and designing systems that meet very specific requirements."

Location

What sets U-Boat Worx apart is that design, engineering and software are all carried out entirely in-house. Assembly also takes place at its own facilities in Breda. "We are a hardware, power and system integrator," says Tolkamp. "The components we source come from suppliers we've worked with for years.

I'd say 95 percent of those are European, and the majority are from right here in the Netherlands. There are a lot of excellent companies here."

Versteeg is confident about the future. "There are outstanding partners in the Netherlands who can help us scale up. We're also bringing in expertise ourselves to set this up properly. In addition, we have an investor who believes in us, which makes a huge difference." A key advantage is the company's own test facility in Curaçao, where systems can be tested in deep water. "That puts us in a strong position. We have real confidence in this market."

Navy

Developments within the Royal Netherlands Navy align well with UBW Naval's ambitions. "The Navy is currently working on operational concepts for the deployment of manned and unmanned systems," says Versteeg. "The Maritime Uncrewed Taskforce has set out a clear vision of where they want to go. That helps us focus our efforts."

UBW's submersibles are mini-submarines that fit inside a standard shipping container. They are a maximum of 40 feet long (around 12 metres) and can safely transport people or equipment underwater. The subs can be deployed overboard using a crane, launched from a glider or even driven into the water directly from the shore.

In addition to the manned variant, UBW Naval is also developing an unmanned version, intended for reconnaissance missions – for example, surveying critical offshore infrastructure. "We have a lot of experience with prototyping and rapidly developing new systems," says Tolkamp. "We can put that to good use for Defence. Our investors are behind us, and with our technology and engineering capacity, we are well equipped for this. We're eager to use our knowledge and expertise to strengthen the resilience of the Netherlands and NATO." ●

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Collaborate more efficiently internationally

As of 1 July, Lars Walrave took on a new role within the Materiel and IT Command (COMMIT), the procurement organisation of the Netherlands' armed forces: Programme Director Government-to-Government (G2G). At a time when the pressure on the procurement organisation is high, he sees Government-to-Government (G2G) agreements as a powerful tool for more efficient international cooperation. These agreements also offer the added benefit of helping to strengthen the position of the Dutch defence and security industry on the international stage.

Text: Eveline Bos

Photo: Mediacentrum Defensie

"There's a shift underway in the dynamics of defence procurement," says Walrave. "In the past, we had a small budget and plenty of time. Now, we have funding but very little time, so working together with other countries makes sense. G2G is one of the options that offers multiple advantages, including economies of scale, standardisation and the distribution of workloads between nations."



Lars Walrave, Programme Director Government-to-Government (G2G).

Structure

In Government-to-Government (G2G) agreements, governments from different countries work directly with one another on issues that are crucial to national security, international development, public infrastructure or the public interest. In this case, that means the supply or development of military equipment or services.

Such agreements are nothing new to COMMIT. "Take, for example, the joint programmes with Belgium concerning procurement of the ASWF (Anti-Submarine Warfare Frigate) and the Mine Counter Measures (MCM) vessels. For the ASWF project, the Netherlands is taking the lead. For the MCM project, the roles are reversed: Belgium is in the lead. That's a clear, recent example of effective cooperation between governments," Walrave adds: "But the agreements that are made, and the way the process is organised, currently differ from project to project and from one project leader to another. My role is to bring structure to the G2G initiatives, as well as to move the process forward and strengthen it. Ultimately, the aim is to make it faster and easier for everyone involved."

Models

Time and effort can be saved during procurement processes by making a number of key decisions in advance. "There are different models that can be used for agreements between governments. For example, when the Netherlands buys something

from the United States, we have to pay a fee – a certain percentage of the value. Do we, as the Netherlands, also want to introduce a similar model? Other issues to consider in advance include development costs. If Defence and industry have jointly developed something, should the invested development costs then be shared between the participating countries? Or, if a company increases its sales thanks to G2G, should the Dutch armed forces then receive a discount? By thinking about these kind of arrangements in advance, we can save time when negotiating G2G agreements and avoid a situation where each project leader has to figure out from scratch what is and isn't possible."

In addition to benefits for the defence organisation itself, the new approach can also offer advantages for industry. The Programme Director explains: "You need to start thinking early on about the capabilities you will need in the future. At that stage, it's not yet about a specific product or solution, but rather a genuine capability requirement. We then need to explore what opportunities exist for Dutch industry. What can we deliver, add or produce here in the

Netherlands? And, very importantly, do other countries need that capability? That question then needs to be translated into a concrete task for COMMIT, identifying which countries we could work with. This approach creates opportunities for industry earlier in the process. And by working together with other countries, we can achieve sufficient scale."

Goal

Starting in October, six people will be joining to establish the new G2G office. This office will become the point of contact for the COMMIT organisation and for interested partner countries on all matters related to international G2G agreements. The aim is to complete the process by the second quarter of 2026, including checklists, guidelines and both internal and international awareness.

"While we're shaping all of this, we are of course continuing to negotiate G2G agreements. Once it's all in place, I won't be needed anymore," says Walrave with a smile. "If I do my job right, I'll make myself redundant as Programme Director!" ●

The Netherlands is leading the ASWF project.



Innovation pavilion at NEDS

The war in Ukraine has demonstrated the rapid pace of technological development on the battlefield. To ensure the safety and effectiveness of our military personnel, the Ministry of Defence must continuously anticipate these changes and provide them with the best equipment and the most advanced IT. This is precisely why collaborating with innovative companies, particularly start-ups and scale-ups, is essential.

Text: Sander Zijlstra

Photos: Mediacentrum Defensie

Of course, having a good product is essential. However, getting it in front of the right stakeholders can be a real challenge, especially for a startup. To give these companies greater visibility, NIDV, in collaboration with Military Innovation by Doing (MIND), is inviting businesses to take part in the Innovation Pavilion (Innovatieplein) at the NEDS.

Platform

The Innovation Pavilion gives these new players a platform to showcase themselves to the international defence and security sector. For MIND, as part of the Knowledge and Innovation Directorate of COMMIT, this is essential to look beyond the horizon and expand the Dutch defence industry with innovative startups. "We're actively seeking out the unconventional players – the companies we haven't yet worked with across Defence, but that may have a compelling proposition," says Major Bas Klis, Innovation Manager at MIND. MIND operates from seven MINDbases spread throughout the Netherlands, where they get to know entrepreneurs at the heart of the regions. The process starts with scouting but goes much further. "We build the network, assess which innovations are relevant to Defence and then initiate projects," says Klis.

Of course, Defence already has a large number of suppliers. What sets startups apart from larger companies, however, is their ability to respond to situations quickly and flexibly. By way of example, Klis shares an anecdote about the successful conclusion of Project Badger. The aim of this project was to explore whether a robot from the civil sector designed for data centre security could complement

Defence's existing security systems. During a test at Eindhoven Air Base, the robot unfortunately broke down. However, Klis was impressed by the startup's quick response: "Within 24 hours they travelled here from abroad, replaced the robot and ensured everything was up and running again. That kind of speed is something we really value." It is clear that Defence is interested in the opportunities that startups offer, but how can these young companies gain a foothold in this world?



Bas Klis from MIND.



Opening of a MINDBase in Rotterdam.

Requirements

Klis has also observed that growing investment in Defence is prompting more companies to approach the organisation with products and services. This increased investment allows MIND to move away from purely transactional relationships with companies and establish genuine partnerships. "That doesn't mean we can compromise on our criteria or quality, but it does make life easier."

For startups that want to register with MIND, clear criteria apply. Their chances ultimately depend on whether they can solve a Defence problem, and if they can, the next step is to assess the Technology Readiness Level (TRL). By the time companies approach MIND, it is essential that they have moved beyond the PowerPoint phase and developed a working prototype. Klis also stresses that it is crucial for startups to be open to piloting their product to demonstrate that it works as promised. Trust is a key element in any relationship with the Ministry of Defence, and this structured approach helps to build it.

Barriers

However, MIND is not solely focused on the objectives of the Ministry of Defence – it also recognises that challenges remain for startups wishing to work with the organisation. For example, a large and complex organisation such as the Ministry of Defence has many different points of entry for companies, which can make it difficult to reach the right person. MIND's network, made up of specialists from across all branches of the Ministry, can help companies navigate this.

Of course, it may also be clear who you need to speak to, but the process of turning that contact into a project can be a challenge in itself. Klis emphasises that MIND has already made significant progress in making processes smoother and faster, but acknowledges that some Ministry procedures can still be slow. "Startups don't just need these projects; they also need to keep the lights on and the business running. I imagine that this can be a real challenge."

There are many channels that startups can approach for support, but Klis is particularly enthusiastic about SecFund. Through this fund, the government can support startups that contribute to the Ministry of Defence's innovation needs with dual-use products. "That really expands our toolbox," says Klis.

MIND therefore has many ways to guide and support startups entering the defence market. Sometimes, however, there are companies that meet all the criteria, but for which the right project or assignment has not yet been found.

To ensure these companies remain on the radar of government and industry, the seven MINDbases – located across different regions of the Netherlands – each select startups to be invited for free participation in the Innovation Pavilion (Innovatieplein) at the NEDS. This year, MIND is focusing on five specific technology areas: sensors, smart materials, intelligent systems, quantum technology and space, which are described in the Defence Strategy for Industry and Innovation. ●



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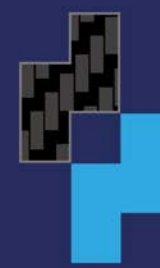
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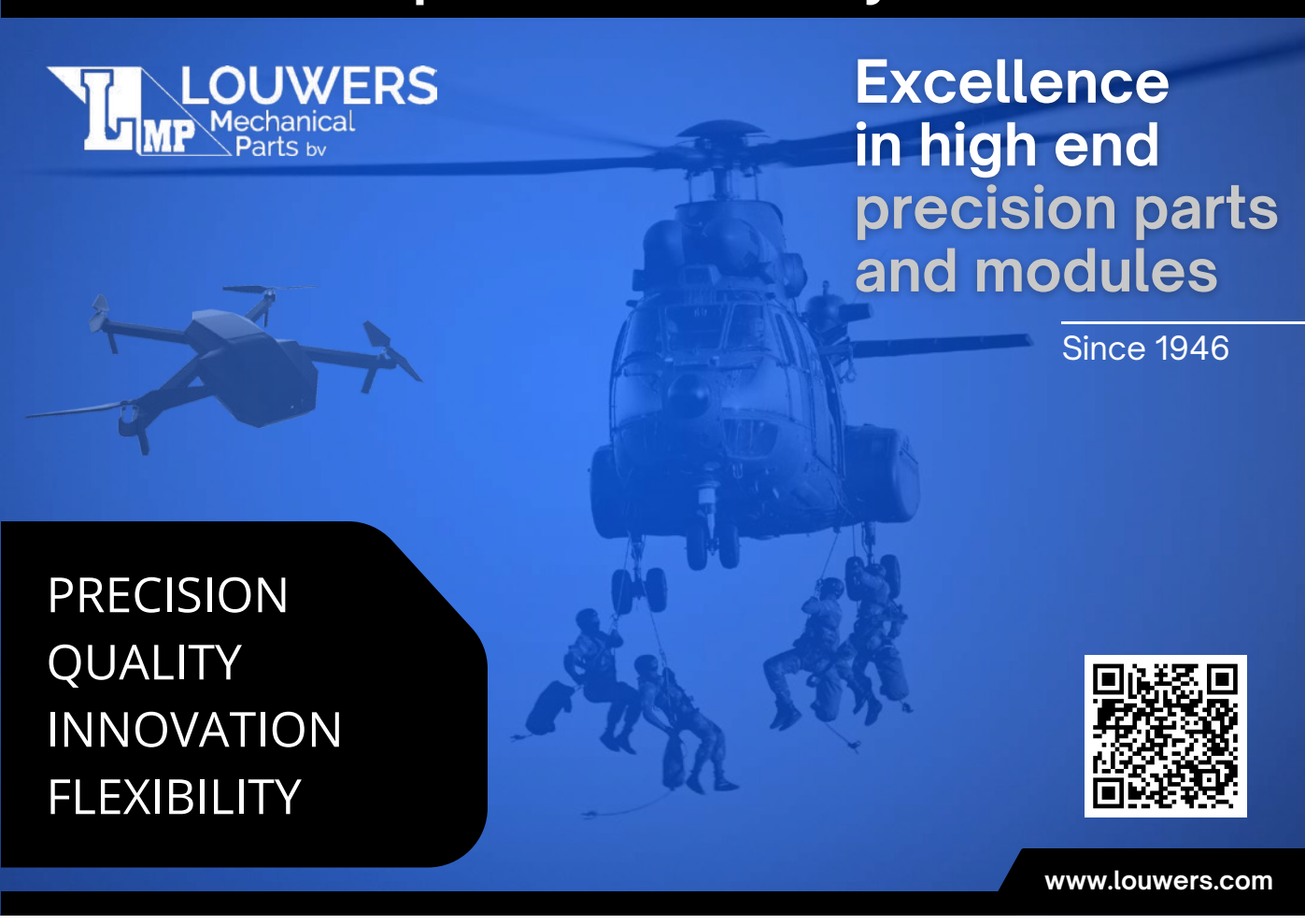
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Mission

The Netherlands Industries for Defence and Security (NIDV) links companies, knowledge institutions, and the government within the Netherlands. Since being founded in 1984 by the ministries of Economic Affairs and Climate, Foreign Affairs, Defence, and industry partners, the NIDV ensures the sustainable positioning of the Dutch defence and security sector both at home and abroad. The NIDV acts as information provider, advocate and service provider for the Dutch Defence and security sector. ●

New participants

The NIDV is growing! Between the end of July and mid-October, we welcomed the following new participants:

Acolad Netherlands B.V.
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