

IN⁴DEF

— **WALLONIA** —

INDUSTRY & INNOVATION FOR DEFENCE

**WALLONIA'S INDUSTRY AND INNOVATION
STRATEGY FOR DEFENCE**



Strengthening economic value creation, strategic autonomy
and resilience through the development of Wallonia's defence
and dual-use industrial and technological base.

COLOPHON

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List of abbreviations

AWEX — Walloon Export and Foreign Investment Agency

GIWAS — Groupement des Industries Wallonnes de l’Aéronautique et du Spatial

NCP Wallonia — National Contact Point Wallonia

SPW EER — Public Service of Wallonia – Economy, Employment and Research

WE — Wallonie Entreprendre

EU — European Union

NATO — North Atlantic Treaty Organization

EDF — European Defence Fund

EDA — European Defence Agency

DIRS — Defence, Industry and Research Strategy

C4ISR — Command, Control, Communications, Computers, Intelligence, Surveillance and Reconnaissance

(C-)UxV — (counter-)unmanned vehicles and systems

DIANA — Defence Innovation Accelerator for the North Atlantic

EUDIS — EU Defence Innovation Scheme

Executive summary

The defence landscape is undergoing a lasting transformation, against the backdrop of a significantly deteriorated geopolitical context. The return of high-intensity war to the European continent, the acceleration of technological disruption, strains on supply chains, the rise of hybrid threats, the vulnerability of critical infrastructure and the requirements of strategic autonomy are profoundly reshaping industrial policy and innovation policy. Contemporary conflicts demonstrate that a country's military capabilities also depend on its industry.

In this context, Wallonia must play its full part in the collective effort for defence, strategic autonomy and resilience, within its own areas of competence: economy, industry, research, innovation, training, employment, financing, internationalisation and business support. Wallonia does not take the place of the federal State, Belgian Defence, or the frameworks of the European Union or NATO. It organises the industrial, technological, scientific, entrepreneurial and financial contribution that its ecosystem can make to defence needs.

The strategy is guided by an explicit vision and mission. By 2030, Wallonia aims to consolidate, in its areas of excellence, a recognised international benchmark position in the defence sector by strengthening its capacity to design, produce and deliver critical systems and subsystems that provide reliability, effectiveness and technological superiority to its partners. Its mission is to strengthen economic value creation, strategic autonomy and resilience through the structured development of Wallonia's defence and dual-use industrial and technological base.

Wallonia is not starting from a blank slate. It already has a significant industrial, technological and scientific base, structured around committed large companies, industrial SMEs, technology start-ups, research centres, universities, university colleges, competitiveness clusters and public operators.

The challenge now is to turn Walloon strengths into tangible impact. The strategy therefore marks a clear shift from a logic of identifying strengths to an impact-driven approach: transforming innovation capacities into concrete industrial and commercial opportunities, supporting investment, strengthening production capacity, creating and maintaining skilled jobs, integrating Walloon companies more deeply into value chains and increasing their presence in Belgian, European, transatlantic and international markets.

Public action is focused on priority domains corresponding to Walloon strengths and identified capability needs. These domains include land, air, space, protection, effectors, munitions, C4ISR, C-UxV and embedded systems, biotechnology, innovative materials and processes, cybersecurity, quantum cryptography, artificial intelligence and autonomous systems. They are designed as complementary building blocks linking research, innovation, industrialisation, operational capabilities and market access.

Implementation is based on a Walloon Defence Task Force. It brings together the main public operators involved in industrial development, innovation, research, financing, entrepreneurial support, training, internationalisation and business representation. Its role is to coordinate, align, guide and make public action clearer in support of Walloon companies.

The strategy pursues five strategic objectives:

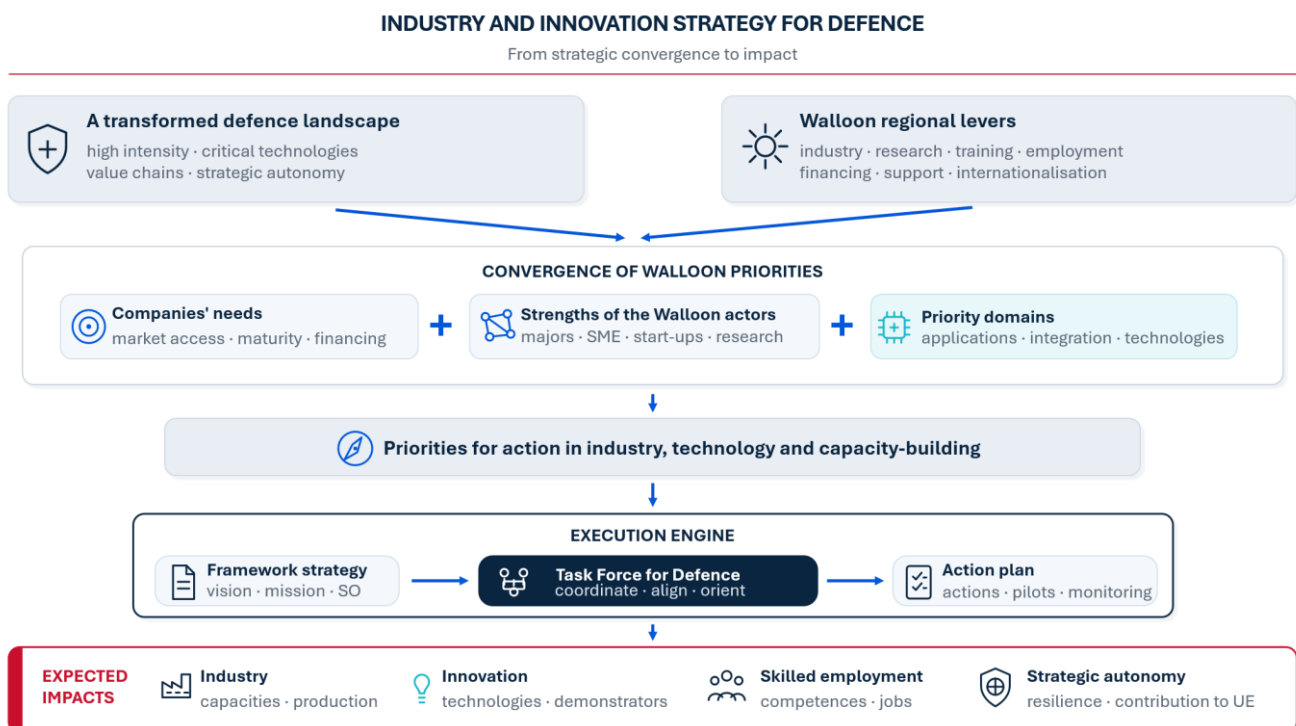
- position Walloon ecosystems within regional, federal, European and transatlantic dynamics;
- strengthen the availability of skills;
- support industrial investment and production capacity;
- accelerate entrepreneurship, research and innovation;
- increase internationalisation and integration into value chains.

Two cross-cutting objectives complete this architecture:

- improve access to information and the visibility of the ecosystem;
- ensure effective steering and coordination between operators.

Implementation is already under way through a first series of actions led by Walloon operators. These actions include dialogue with Belgian Defence and federal authorities, support towards European and transatlantic programmes, support for dual-use research and innovation, industrial maturity building, matchmaking between SMEs, start-ups and “major companies”, mobilisation of financing tools and initial targeted internationalisation initiatives.

Finally, the strategy favours the coordinated mobilisation of existing tools. This approach makes it possible to act across entire value chains, taking into account the often dual-use nature of the technologies, infrastructure, processes and skills useful to defence. Its direction is clear: to turn Walloon strengths into lasting industrial, technological, economic and strategic impact for Wallonia.



1. Act now

1.1. A lasting paradigm shift

Defence is undergoing a lasting transformation. The return of war to the European continent, the proliferation of hybrid threats, cyberattacks, the vulnerability of critical infrastructure, strains on supply chains and the acceleration of technological disruption are profoundly reshaping industrial policy, innovation policy and sovereignty-related policy.

For several decades, European economies evolved in a context marked by a relative decline in defence spending, fragmented industrial capabilities and growing dependence on certain global supply chains. That period is now over. Defence has once again become a major strategic priority for States, the European Union and NATO.

This development is not merely a matter of military trade-offs. It brings back to the forefront the ability of industrial territories to produce, innovate, adapt complex systems and sustain the collective effort over time. In other words, the performance of defence capabilities now depends as much on operational excellence as on the strength of the industrial, technological and scientific ecosystems that make them possible.

1.2. A Walloon responsibility that is embraced and clearly defined

In this context, Wallonia intends to strengthen and structure a dynamic that has long been present on its territory, by building on its assets to contribute to Belgian, European and Allied needs.

Wallonia acts within the scope of its competences. The end goal is defence; the regional levers are industrial, technological, economic, financial, scientific, training and international. The strategy therefore does not replace the federal State, Belgian Defence, or European and transatlantic frameworks: it organises the regional contribution where Wallonia can usefully act.

The question for Wallonia is therefore twofold: how to contribute to the defence, security and resilience effort from its own regional competences; and how to turn this context into an industrial, technological and economic opportunity for its industrial base, skilled jobs, companies and innovation ecosystems.

1.3. A broad yet strategic scope

The defence economy is not limited to the production of armaments. It also includes technologies, components, software, materials, embedded systems, maintenance services, cybersecurity, space, logistics, sensors, energy, robotics, simulation, secure communications, protection of critical infrastructure... A significant share of these activities is dual-use, meaning capabilities that can serve both civilian and defence applications.

The regional contribution is much broader than companies selling directly to defence. It includes all stakeholders involved in strengthening value chains, producing critical building blocks, industrial capacity-building, developing dual-use solutions, enhancing infrastructure resilience and supporting strategic autonomy.

This approach keeps a clear focus on security and defence while opening the scope to sectors that genuinely contribute to it: aeronautics, space, materials, embedded systems, cybersecurity,

biotechnology, artificial intelligence, autonomous systems, infrastructure, mobility, energy, maintenance, testing and validation.

It favours a strategic scope centred on capability needs, market requirements and domains in which Wallonia has distinctive strengths.

1.4. Embedding Walloon action in a multi-level institutional framework

The Walloon strategy is embedded in a multi-level institutional framework in which responsibilities and levers for action are clearly allocated. Capability choices, defence priorities and procurement mainly fall within the federal remit, while structuring dynamics in financing, research and standardisation are largely shaped at European level and within NATO mechanisms. In this context, Wallonia's role is neither to replace these decision-making levels nor to duplicate their instruments, but to organise the contribution of its industrial, technological and scientific ecosystem in a coherent and proactive manner.

This contribution is based on alignment and articulation with the needs expressed by Belgian Defence, European programmes and major international value chains. It requires structured dialogue with federal authorities, an active presence in European and transatlantic networks and mechanisms, and the ability to anticipate regulatory, technological and capability developments. The challenge is twofold: enabling Walloon stakeholders to position themselves where programmes and partnerships are being built, and ensuring that the industrial and technological priorities in which Wallonia has distinctive strengths are recognised at an early stage.

Within this framework, Wallonia's added value lies in activating its own levers: support for innovation and applied research, business support, financing, skills development and internationalisation. By mobilising these tools in a coordinated manner and directing them towards relevant value chains, the strategy aims to strengthen the visibility, clarity and positioning of the Walloon ecosystem. The objective is to enable Wallonia to engage credibly and sustainably in Belgian, European and international dynamics, while maximising industrial, technological and economic benefits for its territory.

2. A clear Walloon ambition

2.1. Vision

By 2030, Wallonia aims to consolidate, in its areas of excellence, a recognised international benchmark position in the defence sector, by strengthening its capacity to:

- Design, produce and deliver critical systems and subsystems;
- Provide reliability, effectiveness and technological superiority to its partners;
- Contribute concretely to the operational capabilities of its partners, including where such capabilities must meet the requirements of theatres of operation.

This vision covers the entire value chain, from research to integration, industrialisation and the exploitation and valorisation of research results within defence and dual-use value chains.

2.2. Mission

The mission is to strengthen economic value creation, strategic autonomy and resilience through the structured development of Wallonia's defence and dual-use industrial and technological base.

This mission articulates three main purposes:

- Economic and technological sovereignty;
- Industrial benefits and skilled employment;
- The long-term anchoring of companies and capabilities in Wallonia.

2.3. Three mutually reinforcing purposes

First, Wallonia must strengthen its ability to master, develop and valorise technologies, processes, components, subsystems and know-how that are essential to defence and resilience value chains. This sovereignty is part of a European ambition: by consolidating certain critical segments, Wallonia contributes to the robustness of Belgian and European value chains and to maintaining strategic know-how in Europe.

Second, defence markets require high-level skills, stringent standards, long cycles, advanced technologies and robust production capacity. For Wallonia, the challenge is to turn these requirements into levers for industrial development, support for skilled employment, business growth and productive investment.

Third, defence and dual-use activities can help maintain, develop and sustain industrial capabilities in Wallonia that would be difficult to rebuild if they disappeared. The issue concerns not only "major companies", but also subcontracting chains, specialised suppliers, research centres, testing infrastructure and rare skills.

3. A solid foundation to build on

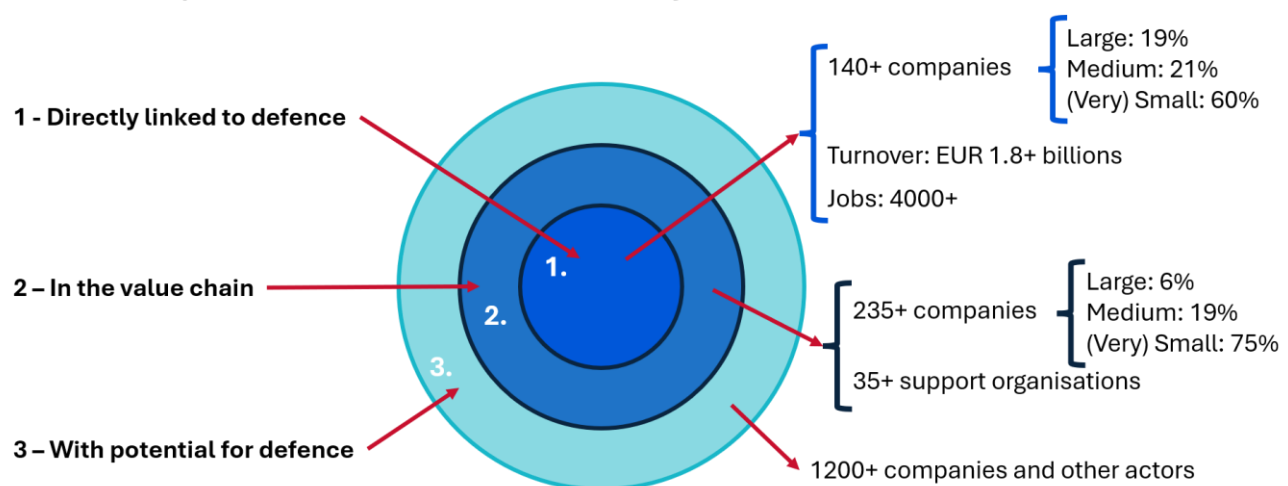
3.1. An industrial and technological base already in place

Wallonia has had an active ecosystem in defence and dual-use technologies for many years. Despite several decades of relative underinvestment in Europe, part of Walloon industry has maintained its position thanks to its capacity for innovation, its internationalisation and regional support. This resilience is now an asset.

Directly linked to defence markets, Wallonia now has more than 140 companies, representing more than EUR 1.8 billion in turnover and more than 4,000 jobs. By broadening the scope to the value chains concerned, more than 375 companies can be identified; this figure exceeds 1,200 actors when subcontractors, suppliers and service providers with dual-use potential are included. Alongside them, more than 35 research, training, financing and support organisations contribute to structuring the ecosystem.

This base is not limited to a few companies selling equipment directly to Belgian Defence. It includes “major companies”, industrial SMEs, specialised subcontractors, component suppliers, engineering firms, technology start-ups, research centres, universities, university colleges and public operators.

Walloon companies and actors in the defence ecosystem



3.2. Key structuring players and real value chains

In this strategy, the term “majors” refers to large companies or companies of significant scale within their market segment or the Walloon ecosystem, which hold a leadership position through their industrial capacity, market access, relationships with contracting authorities and prime contractors, mastery of critical products or subsystems and capacity to pull SMEs and start-ups into value chains. They are considered anchor points and platforms for ecosystem development.

Companies occupying a structuring position in the Walloon ecosystem include FN Browning Group, KNDS Belgium, Thales Belgium, John Cockerill Defense, Safran Aero Boosters, Sonaca, SABCA, Eurenco Clermont, ...

SMEs are at the heart of this value chain, but they are not a homogeneous group. Some provide technologies, software, sensors, cybersecurity solutions, artificial intelligence, autonomous systems

or deep tech. Others are critical industrial links through their production, machining, assembly, materials, maintenance, quality, certification or advanced manufacturing capacities.

The diversity of the Walloon ecosystem is an advantage if it is organised. It allows Wallonia to act across the entire value chain, from design, materials, components, subsystems and embedded systems to integration, production, maintenance, testing, validation, cybersecurity, simulation, digitalisation, training and market access.

3.3. Research, innovation and skills: a distinctive foundation

Accredited research centres, universities and university colleges are an essential component of the ecosystem. They provide a high-level scientific and technological foundation that can be directly mobilised in collaborative approaches between industry, Belgian Defence and innovation actors.

Actors such as Cenaero, Materia Nova, CRM Group, Sirris, Multitel, CETIC, ULiège and UCLouvain have recognised expertise in areas critical to defence and dual-use applications: materials, mechanics, modelling, simulation, cybersecurity, communications, artificial intelligence, biotechnology, innovative processes, embedded systems, additive manufacturing and experimental validation.

Competitiveness clusters play an interface role between companies, research and public authorities. Public operators — SPW EER, WE, AWEX, NCP Wallonia, IGNITY and training and employment operators — make it possible to act on the main conditions for ecosystem development.

3.4. A trajectory already under way

The Walloon strategy builds on work undertaken over several years. As early as 2018, MecaTech and Skywin competitiveness clusters joined forces to structure the defence ecosystem around a working group bringing together the main Walloon industrial players. In 2023, this dynamic was deepened through a technological and strategic roadmap for the Walloon defence ecosystem.

This strategy builds on and extends that work. It aims to place it within a broader, clearer and more operational policy framework. It enables a shift from technological prioritisation and sectoral mobilisation to a focus on industrial impact.

4. From potential to impact

4.1. What companies are saying

The strategy is based on direct engagement with the industrial base. The 80 interviews conducted with SMEs made it possible to better understand needs on the ground, the barriers encountered by companies and the concrete conditions for accessing defence markets.

These exchanges confirm that defence is a specific market: cycles are long, technical, regulatory and security requirements are high, access to the right contacts is difficult and commercial relationships are often based on trust, references and integration into structured value chains.

Four lessons emerge. Many SMEs have know-how relevant to defence without spontaneously identifying themselves as defence companies. The main challenge is not always direct sales to Belgian Defence, but integration into value chains led by “majors” or integrators. Needs differ depending on company profiles. Finally, public support instruments exist, but they need to be better coordinated, clearer and more strongly geared towards industrial impact.

4.2. Five challenges to address

Challenge 1 — Visibility and clarity: better identify stakeholders, assess their capabilities, make testing and production capacity visible and enable external partners to quickly understand what Wallonia can offer.

Challenge 2 — Market access: help SMEs understand needs, identify the right partners, prepare for market requirements and join relevant value chains.

Challenge 3 — Maturity: support the transition from innovation to industrialisation and then to market, integrating testing, validation, certification, cybersecurity, industrial robustness, financing and the ability to deliver over the long term.

Challenge 4 — Agility: reduce the time between need, solution, testing, adaptation and production through shorter cycles, demonstrators, accessible test environments and more direct dialogue between end users, “majors”, SMEs and research centres.

Challenge 5 — Coordination: organise the action of operators to reduce duplication, streamline information flows and accelerate companies’ development pathways.

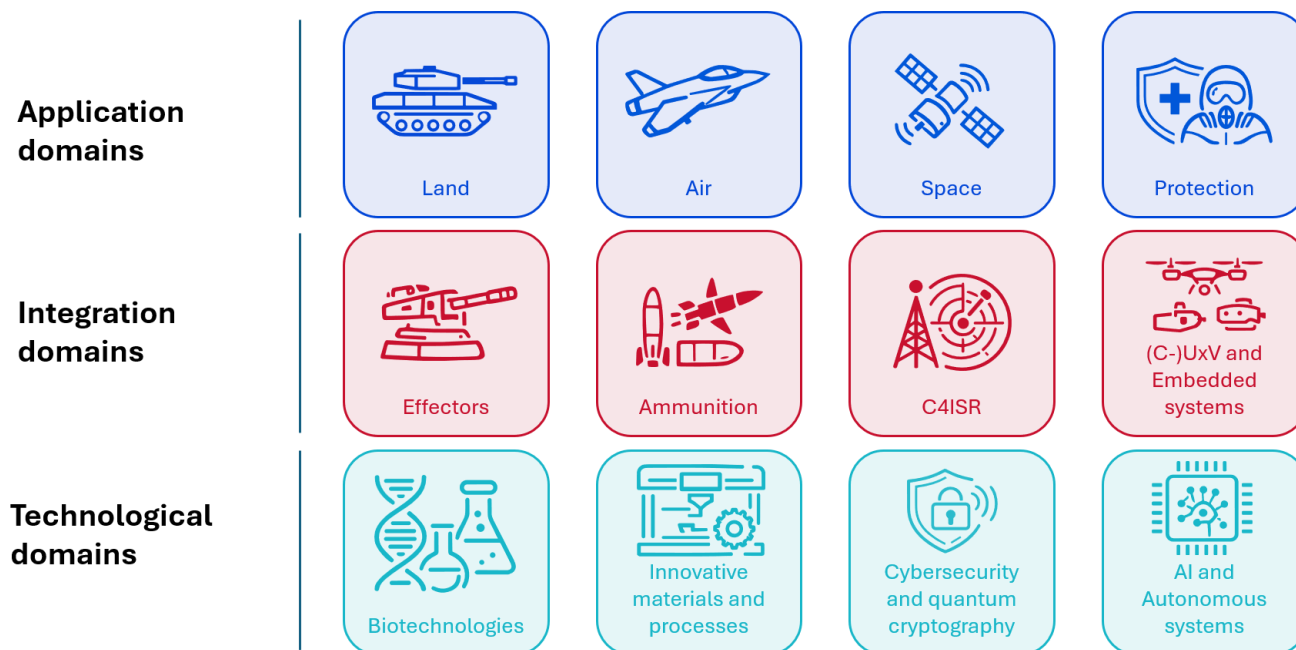
These challenges underline the transformation potential of the Walloon ecosystem towards greater visibility, connection, industrialisation and integration into value chains.

5. Focusing efforts to succeed

5.1. Priorities that focus efforts without constraining stakeholders

The Walloon strategy is based on the identification of priority domains. These correspond to existing or emerging strengths of the Walloon ecosystem, identified capability needs, prospects for integration into value chains and opportunities for industrial valorisation.

These domains form a coherent set of complementary building blocks.



a) Application domains

The priority application domains are land, air, space and protection. They correspond to operating environments, markets, capability needs and value chains in which Wallonia has stakeholders, skills or distinctive prospects.

The land domain covers systems, equipment, vehicles, effectors, protection systems, munitions, embedded systems, maintenance, simulation and support capabilities related to ground operations.

The air domain builds on Walloon strengths in aeronautics, propulsion, structures, actuators, embedded systems, maintenance, test benches and subsystem integration.

The space domain is a major driver of security, surveillance, communication, navigation, intelligence, resilience and strategic autonomy.

The protection domain covers protection of people, infrastructure, platforms, data, communications, sensitive sites and critical capabilities.

b) Integration domains

The priority integration domains are effectors, munitions, C4ISR, and C-UxV and embedded systems. They refer to capabilities that are not limited to isolated technologies but require mastery of integration, the operational environment, security, reliability, certification and production.

Effectors focus on the ability to produce a military effect on a target, whether kinetic, electromagnetic, cyber or directed-energy.

Munitions cover the design, manufacturing, packaging, storage, transport, employment and life-cycle management of payloads intended to produce a military effect.

C4ISR is a cross-cutting domain central to collaborative operations, command systems, information superiority, cybersecurity, sensors and decision support.

C-UxV systems, drones, counter-drone systems and embedded systems are a major growth domain involving autonomous or remotely operated platforms, sensors, embedded intelligence, secure communications, navigation, payload integration, and threat detection and neutralisation.

c) Technological domains

The priority technological domains are biotechnology, innovative materials and processes, cybersecurity and quantum cryptography, as well as artificial intelligence and autonomous systems.

Biotechnology is relevant to a modern vision of security and resilience, notably health, nuclear medicine, diagnostics, protection against chemical, biological, radiological and nuclear risks, operational medicine, detection, medical logistics, critical production, biopharma and medical technologies.

Innovative materials and processes are a cross-cutting foundation for structures, additive manufacturing, maintenance, composites and lightweighting. They bring high performance and resistance to harsh environments.

Cybersecurity and quantum cryptography are essential to the robustness of systems, communications, infrastructure, value chains and development environments.

Artificial intelligence and autonomous systems cut across all domains, from decision support and sensor fusion to predictive maintenance, navigation, simulation and embedded systems.

d) Related sectors

The strategy identifies these domains in order to focus public action. This focus should not, however, constrain stakeholders. Other sectors may contribute to defence and resilience objectives when they meet capability, operational continuity or strategic support needs, including construction, mobility, energy, logistics and certain infrastructure.

5.2. A clear impact-driven approach

Innovation alone is not enough. It must be transformed into industrial capacity, tested solutions, qualified products or services, integration into value chains, contracts, jobs and international positioning.

The impact-driven approach is based on a continuum that needs to be strengthened: need, orientation, research, development, prototyping, testing, validation, adaptation, industrialisation, financing, market access and internationalisation. This approach is particularly necessary in defence, where markets are more closed, cycles are longer and requirements are higher than in many civilian markets.

Industrial maturity is therefore a prerequisite for access. Many Walloon companies have relevant technological or industrial building blocks, but need to adapt their products, processes, business models or production chains to the requirements of defence and dual-use. Agility is the other condition of relevance: needs, demonstration, user feedback, adaptation and capacity-building must be brought closer together.

5.3. Internationalisation as an extension of industrial strategy

Defence markets are inherently international, structured by public decisions, alliances, major programmes, complex value chains and long-term relationships. Internationalisation is therefore a natural extension of industrial strategy and a condition for integration into relevant programmes, partnerships and markets.

6. Moving to implementation

6.1. A simple and clear action framework

The Walloon strategy is implemented around five strategic objectives and two cross-cutting objectives. They translate the political ambition into concrete lines of action, consistent with the priority action plan monitored by the Task Force and with the specific roles of public operators and ecosystem partners.

Each objective is linked to actions, public operators involved and expected results, following a logic of impact, coordination and value creation for the Walloon ecosystem.



6.2. SO1 – Strategically position Walloon ecosystems

The first objective is to position Walloon ecosystems durably at the heart of regional, federal, European and transatlantic dynamics. It means ensuring that the industrial, technological and innovation priorities in which Wallonia has strengths are recognised at the appropriate level.

This positioning requires structured dialogue with Belgian Defence, relevant federal authorities, European institutions, NATO networks and major industrial players. It also requires a more active presence in the expert groups, networks, programmes and initiatives where future needs, calls and partnerships are prepared.

Wallonia must be able to feed its priorities upwards, anticipate regulatory developments, contribute to Belgian positions when its industrial interests are concerned, and support the participation of its companies, research centres and universities in key programmes. Particular attention must be paid to SMEs so that access to information and influence networks is not reserved for already internationally visible actors.

6.3. SO2 – Strengthen the availability of skills

The second objective concerns human resources and skills. The development of a strong defence industrial and technological base directly depends on the availability of technical, industrial, digital, scientific, commercial, regulatory and project-management profiles.

Skills shortages may become a limiting factor for business growth, production ramp-up, innovation capacity, certification, maintenance and integration into value chains. The challenge is therefore not only to meet immediate recruitment needs, but also to sustainably strengthen the attractiveness of occupations, the relevance of training provision and the visibility of career paths.

The strategy must help objectively identify priority needs, shortage occupations, the causes of shortages and available training capacity. It must bring companies, federations, education, training and employment actors closer together. It must also promote technical professions, Industry 4.0 and 5.0, aeronautical maintenance, embedded systems, cybersecurity, mechatronics, materials, advanced production and occupations linked to demanding environments.

This objective is based in particular on a better understanding of the ecosystem's skills needs, in order to guide training, attractiveness and talent development actions.

6.4. SO3 – Support investment in industry and production capacity

The third objective is to support investment in Walloon industry and SMEs in order to meet defence capability needs. Wallonia already has companies positioned in defence markets, as well as industrial players supplying systems, subsystems, components and critical technologies to national and international value chains.

The challenge is to strengthen the depth, resilience and capacity of the existing industrial base to pull the wider ecosystem forward. This requires supporting companies' financial soundness, investment capacity, industrial maturity, adaptation to defence market requirements, cybersecurity, ability to produce in volume and integration into value chains.

The strategy must also encourage balanced relationships between “majors” and SMEs. Large companies can act as prime contractors, integrators, gateways and references. But capacity-building must benefit the entire sector and strengthen the depth of Wallonia's industrial base.

6.5. SO4 – Accelerate entrepreneurship, research and innovation

The fourth objective is to strengthen and accelerate entrepreneurial, research and innovation dynamics. Innovation is a central lever for meeting defence needs, creating new value chains and positioning Walloon companies in distinctive technological segments.

The strategy must foster the emergence of individual and collaborative projects, guide project leaders towards relevant financing, articulate regional instruments with federal, European and transatlantic initiatives, support innovative start-ups and SMEs, and co-construct technological trajectories aligned with capability needs.

Dual-use is a major lever, complemented by the development of solutions directly addressing defence needs when they fit within Belgian, European or Allied priorities.

6.6. SO5 – Increase internationalisation and integration into value chains

The fifth objective is to increase the internationalisation capacity of Walloon companies so that they can integrate European and global value chains. Defence is an international market structured by States, alliances, major programmes, integrators and long-term partnerships.

Internationalisation should not be understood merely as export promotion. It is a strategic capability enabling actors to detect opportunities, understand programmes, identify partners, join consortia, meet regulatory requirements, position themselves with contracting authorities and prime contractors and attract foreign investment useful to the Walloon ecosystem.

The strategy must mobilise economic diplomacy, trade fairs, missions, international networks, procurement mechanisms, European programmes, industrial partnerships and international growth financing tools. It must also support companies in understanding regulations, particularly licences, dual-use goods, compliance and legal certainty.

6.7. CSO1 – Increase access to information and visibility of the ecosystem

CSO1 aims to make the Walloon ecosystem clearer, more visible and more accessible to companies, contracting authorities, prime contractors and external partners. In a complex environment, access to information, mapping and assessment of actors and matchmaking are concrete conditions for accessing defence and dual-use opportunities.

Within the action plan, this objective translates into actions to consolidate a living database about the actors in the regional ecosystem, targeted dissemination of calls and events, identification of testing and validation capacities, matchmaking and promotion of Wallonia's priority domains.

6.8. CSO2 – Ensure effective steering and coordination between operators

CSO2 aims to ensure operational steering of the action plan and coordination between operators. It translates into concrete actions to monitor the action portfolio, share information, report to the Government and adjust priorities.

This coordination must remain agile, respectful of each operator's specific role and adapted to the confidentiality requirements of the defence sector. It makes it possible to connect needs, solution development, validation, industrialisation, financing, internationalisation and market access.

6.9. Mobilising the right mechanisms rather than multiplying instruments

Wallonia already has public support instruments capable of supporting companies at every stage of their development: research, innovation, investment, financing, growth, internationalisation, training, entrepreneurial support, access to European programmes and matchmaking. The strategy aims to better orient, coordinate and promote these tools for value chains relevant to defence and dual-use.

It favours the integrated mobilisation of existing tools. For example, in 2025, WE's equity, loan and guarantee interventions represented EUR 115 million for industrial prime contractors and EUR 89 million for actors in aeronautics, space and dual-use.

This choice reflects Wallonia's economic reality. The business models of many companies relevant to defence are not exclusively military. They are based on hybrid markets: defence, security, space, aeronautics, critical infrastructure, industry, mobility, energy or health. An overly compartmentalised approach would reduce the leverage effect.

6.10. Five families of mechanisms to activate

The first family concerns research and innovation. SPW EER, competitiveness clusters, research centres, universities, university colleges and NCP Wallonia play a decisive role in guiding projects, facilitating collaborations, supporting applied research, assisting applications and connecting actors to European programmes.

This mobilisation builds on continuity. Between 2020 and 2024, SPW Research financed projects led by large, medium-sized and small companies active within the defence, dual-use and subcontracting scopes. The 17 technological innovation partnerships, the WINGS programme endowed with more than EUR 100 million and collaborative cluster projects helped consolidate an innovation base that can be mobilised.

The second family concerns financing and investment. WE mobilises its equity, loan, guarantee and co-financing instruments to support growth, investment, industrialisation, capacity-building, internationalisation and business anchoring.

The third family concerns entrepreneurial and technological support, notably through IGNITY, clusters, federations and specialised operators.

The fourth family concerns internationalisation. AWEX mobilises its networks, economic and commercial advisers, prospecting actions, trade fairs, missions, support schemes and economic diplomacy.

The fifth family concerns skills, through companies, competence centres, training operators, education, Forem and sectoral federations.

Indicative distribution of SPW Research funding for companies over the 2020–2024 period (EUR million)

2020–2024 funding (EUR million)	Large companies	Medium-sized companies	Small companies	Total
Dual use	330	115	679	1,124
“Defence” companies	160	42	17	219
Subcontractors	5	32	168	206

7. Steering over the long term

7.1. A Task Force to coordinate and accelerate

The implementation of the strategy is based on a Walloon Defence Task Force. It is a tool for coordination, alignment and collective mobilisation in support of the regional economic interest.

The Task Force brings together the key Walloon actors involved in industrial development, innovation, research, financing, internationalisation, entrepreneurial support, skills and representation of companies active in defence and dual-use domains. It provides a structured forum for aligning priorities, sharing information and building a common action plan.

It fulfils five operational functions: clarity, coordination, matchmaking, scouting and positioning, and strategic feedback.

- Clarity: identifying actors, mapping and assessing capabilities, making mechanisms accessible and guiding companies towards the right contacts.
- Coordination: aligning operators, avoiding duplication, articulating research, financing, support, internationalisation and skills actions, and monitoring structuring projects.
- Matchmaking: connecting SMEs, start-ups, “majors”, research centres, clusters, prime contractors, end users and international partners.
- Scouting and positioning: scouting Belgian, European, transatlantic and international programmes, anticipating calls, identifying consortia and formulating Wallonia’s messages in the appropriate forums.
- Strategic feedback: informing the Government of companies’ needs, regulatory obstacles, skills shortages, European opportunities, financing issues, technological priorities, required investments and results achieved.

The Task Force must also structure dialogue with “majors” with a view to pulling the ecosystem forward. This dialogue should identify industrial needs, qualify relevant technological building blocks, identify potential suppliers, prepare demonstrators, facilitate the integration of solutions developed by SMEs and start-ups, and help companies progress towards standards compatible with defence markets.

Its operating principles are:

- Complementarity: each operator acts where its added value is strongest.
- Clarity for companies: a clear, guided and professional pathway.
- Confidentiality: secure coordination adapted to sector constraints.
- Result-driven: concrete and measurable achievements.
- Agility: the ability to adapt to feedback from the field, programmes and capability needs.

Its added value is straightforward: to offer Walloon companies a clearer and more effective pathway through an institutional and operational landscape that can sometimes be fragmented.

The stakeholders involved are Agoria Wallonia, AWEX, GIWAS, IGNITY, MecaTech, Skywin, SPW EER and Wallonie Entreprendre. Other stakeholders may be associated depending on themes, needs and relevant expertise.

7.2. Steering through the action plan and results

A strategy dashboard will combine two complementary levels of monitoring: operational implementation of the action plan, and the economic, industrial, technological and international effects of the strategy. The aim is not to create an additional administrative burden, but to objectively assess progress made, identify bottlenecks and guide the allocation of public resources.

Indicators will be updated each year in the fourth quarter, in order to take account of the official publication of company accounts and allow reliable consolidation of economic, financial and employment data. The indicators and the data on which they are based will need to be kept up to date in connection with Belgian Defence and the actors concerned.

Conclusion – Turning Walloon strengths into impact

Wallonia has many of the assets needed to contribute fully to strengthening the security, resilience and strategic autonomy of Belgium and Europe. It can build on a recognised industrial base, innovative companies, leading research centres, high-level skills, effective public support instruments and an industrial tradition firmly rooted in its territory.

This strategy reflects a clear conviction: Wallonia's contribution to the European defence effort is built first and foremost through industry, innovation, technology, research, training, investment and international openness. Within the scope of its competences, Wallonia intends to fulfil its role to the full and bring its strengths to bear on a challenge that goes beyond purely military considerations.

The ambition is to take a further step by accelerating the transition from innovation to industrialisation, strengthening companies' growth capacity, consolidating their integration into European and international value chains and creating the conditions for the sustainable development of Wallonia's industrial and technological base.

Beyond sectoral objectives, this strategy pursues a broader purpose: to make Wallonia a territory capable of transforming its skills, technologies and know-how into concrete capabilities serving collective security, European sovereignty, economic prosperity and employment. It is in this spirit that Wallonia intends to contribute, at its own level, to building the Europe of tomorrow.

Annex 1: Priority actions

The priority actions of the Walloon Defence Task Force are organised around five strategic objectives and two cross-cutting strategic objectives.

1. SO1 – Strategically position Walloon ecosystems

The first objective is to position Walloon ecosystems durably at the heart of regional, federal, European and transatlantic dynamics. It means ensuring that Wallonia's industrial, technological and innovation priorities in which it has strengths are recognised at the appropriate level.

The action plan includes, in particular, the following actions:

Structured dialogue with Belgian Defence and federal authorities

Organise regular consultation to feed Walloon industrial priorities upwards, identify opportunities linked to federal programmes and articulate regional tools with Belgian Defence mechanisms.

European mirror group and defence / dual-use strategic monitoring

Anticipate European legislative, budgetary and programme developments in order to defend Walloon industrial interests and prepare companies' positioning in future European programming.

Access for Walloon actors to European and transatlantic expert networks

Support the presence of Walloon companies, SMEs, research centres and universities in relevant expert groups so that the Walloon ecosystem is present where future needs, calls and consortia are prepared.

2. SO2 – Strengthen the availability of skills

The second objective concerns human resources and skills. The development of a strong defence industrial and technological base directly depends on the availability of technical, industrial, digital, scientific, commercial, regulatory and project-management profiles.

The action plan includes, in particular, the following actions:

Wallonia Aero-Space-Defence skills plan

Document companies' real needs, identify shortage occupations, critical skills, recruitment barriers and gaps between industrial needs and available training capacity.

Rapid solutions for critical skills

Test short-term operational responses with companies, including targeted short courses, tutoring, in-company mentoring, pooling of trainers and micro-modules on critical skills.

Attractiveness and adaptation of training to industrial defence occupations

Bring companies, federations, Forem, education and training centres closer together to adapt training provision and promote technical, industrial, digital and maintenance occupations useful to defence and dual-use sectors.

3. SO3 – Support industrial investment and production capacity

The third objective is to accelerate the industrial capacity-building of Walloon companies, especially SMEs, in order to meet defence requirements, strengthen value chains and support production, employment and industrial anchoring.

The action plan includes, in particular, the following actions:

Fast-track financing for industrial capacity-building

Mobilise regional financial levers to support productive investment, growth, increased production capacity and the integration of Walloon companies into Belgian, European and international value chains.

Dual-use pathway for technology SMEs

Diagnose the dual-use potential of technology start-ups and SMEs, identify required adaptations and support them towards the maturity, quality and certification levels expected by Aero-Space-Defence markets.

CapImpact Defence: industrial maturity and SME ramp-up

Assess and strengthen the ability of industrial SMEs to meet defence standards in quality, compliance, production capacity, supply chain, industrial performance and integration into value chains.

Robust value chains: cybersecurity, trust and SME–“majors companies” links

Strengthen security and trust in supply chains, notably through SME cybersecurity, balanced contractual relationships and matchmaking between technology start-ups, SMEs and Walloon “majors”.

4. SO4 – Accelerate entrepreneurship, research and innovation

The fourth objective is to strengthen and accelerate entrepreneurial dynamics, research and innovation. Innovation is a central lever for meeting defence needs, creating new value chains and positioning Walloon companies in distinctive technological segments.

The action plan includes, in particular, the following actions:

Orientation and preparation of defence / dual-use projects

Guide companies, research centres and project leaders in assessing their situation and needs, and define with them a relevant roadmap using the most appropriate mechanisms according to theme, maturity level and industrial ambition.

COOTECH Defence/Dual-use and Win2Def

Finance research and innovation projects aligned with Belgian Defence priorities or with the development of dual-use technologies, strengthening economic value creation and the transition towards industrialisation.

Defence start-up pathway: Start2Def, DIANA, EUDIS, MaJoR, Start-up Boost and venture capital

Increase the number of Walloon start-ups and SMEs applying to, selected by, financed and supported through Belgian, European and transatlantic defence and dual-use mechanisms, while facilitating access to major contractors and investors.

Roadmaps and test environments: Cap4Land, Space4Defence and (C-)UAV zones

Align technological priorities with capability needs, define development and delivery trajectories, structure land, space, drone and counter-drone ecosystems, and facilitate access to test environments enabling rapid prototyping, validation and adaptation cycles.

5. SO5 – Increase internationalisation and integration into value chains

The fifth objective is to increase the internationalisation capacity of Walloon companies so that they can integrate European and global value chains. Defence is an international market structured by States, alliances, major programmes, integrators and long-term partnerships.

The action plan includes, in particular, the following actions:

Targeted international defence action programme

Prospect new markets through targeted actions, connect foreign and Walloon ecosystems, and support industrial, commercial and innovation partnerships in priority markets.

Coordinated Walloon presence at specialised trade fairs and economic missions

Use the presence of Walloon “majors” to drive broader participation by SMEs, start-ups and technology companies, prepare contacts according to sector codes and increase the international visibility of the Walloon ecosystem.

Access to institutional buyers and regulated markets: NSPA, licences and dual-use goods

Support Walloon companies in accessing international procurement agencies and defence markets, while strengthening their understanding of rules applicable to licences, defence-related products and dual-use goods.

International growth, strategic investors and One Stop Shop Defence

Support the international growth of Walloon companies, attract foreign investors useful to regional value chains, make the Walloon offer clear and facilitate the reception, follow-up and anchoring of structuring foreign actors.

6. CSO1 – Increase access to information and visibility of the ecosystem

The first cross-cutting objective is to make the Walloon ecosystem clearer, more accessible and more visible to companies, contracting authorities, prime contractors, institutional partners and foreign actors.

The action plan includes, in particular, the following actions:

Qualified database of the Walloon defence ecosystem

Develop the existing database into a living, qualified and usable mapping of companies, research centres, skills, infrastructure and operators so that relevant actors can be quickly identified for an opportunity, request or project.

Mapping of test, validation and demonstration infrastructure

Make testing and validation capacities available in Wallonia visible, clarify their conditions of access for SMEs and identify unmet needs to be fed back to authorities or Belgian Defence.

Orientation portal, presentation of Wallonia's strengths and active ecosystem scouting

Centralise useful information, guide companies towards the right mechanisms, promote priority innovation domains and disseminate relevant scouting on calls, events, regulatory developments and market opportunities.

7. CSO2 – Ensure effective steering and coordination between operators

The second cross-cutting objective is to make the Task Force a useful, regular and result-driven coordination tool serving the Government and companies.

The action plan includes, in particular, the following actions:

Quarterly political steering of the strategy

Ensure alignment of actions with political intent, feed back companies' expectations and needs, validate priorities and arbitrate points requiring governmental orientation.

Operational coordination and shared company monitoring

Streamline information-sharing between operators, coordinate company follow-up, launch thematic working groups and organise collective responses to identified opportunities or difficulties.

Common dashboard and reporting to Government

Monitor achievements, results and impacts of the strategy through a limited number of indicators in order to document progress, identify bottlenecks and report regularly to the Government.

Annex 2: Key strategic indicators (KPIs)

#	KPI	Definition	Relevance for steering
1	Turnover of the industrial and dual-use base	Aggregated turnover of companies within the scope, with possible distinction between activities directly related to defence, dual-use and related industrial activities.	Track the economic significance of the sector and document its contribution to regional value creation.
2	Value added generated in Wallonia	Aggregated value added of companies within the scope, calculated from annual accounts and, where possible, broken down by degree of proximity to defence markets.	Measure territorial economic impact beyond turnover alone and assess productive anchoring in Wallonia.
3	Employment in the industrial and technological base	Number of jobs linked to companies within the scope.	Track employment impact.
4	Internationalisation and integration into value chains	Share of turnover generated through exports and, where information is available, development of Walloon companies' integration into Belgian, European or international value chains.	Track the international competitiveness of the sector and its ability to access markets and strategic partnerships sustainably.
5	R&D effort	Research and development expenditure relative to turnover of the industrial and dual-use base, or an equivalent indicator of technological intensity where available data do not allow a complete calculation.	Measure the ecosystem's capacity for innovation, upgrading and technological transformation.