



Annual Report 2025



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1. Fundación Feindef

Fundación Feindef is a private, non-profit foundation dedicated to raising awareness of defence and security issues in Spanish and European society, promoting the importance of the sector and of scientific and technical research and innovation as an engine of economic and technological growth and social integration.

Fundación Feindef was established in 2020 with the aim of boosting the Spanish defence and security industry and fostering its international expansion. Founded by the Ministry of Defence and the industry associations TEDAE and AESMIDE, Fundación Feindef aims to be a strategic tool that allows the Spanish defence and security industry to secure the prominent position it deserves in Spain and project an image of modernity and innovation abroad that is in line with its true capabilities.

Aims of the Fundación Feindef

- To contribute to reinforcing the modern image of the Spanish defence industry, integrated within Europe and with global projection, aiming to become a driver of innovation, integration, and a culture of defence.
- To promote and raise awareness of the scientific and technical R&D&I activities within the industry at large, and specifically within the defence and security sectors, across Public Research Organisations, universities, and General State Administration bodies, with the aim of building capacity and disseminating their values within society.
- To encourage the transfer of defence and security technologies to society, enabling it to benefit from these advancements.
- To boost the internationalisation and integration of the Spanish defence and security industry, particularly through European Union Framework Programmes and consortia.



2. Lines of Action

Fundación Feindef carries out its work through various strategic lines that channel its initiatives and projects, aimed at fulfilling its aims and driving innovation, dissemination, and the promotion of talent in the field of defence and security. Currently, its activity is structured around three main lines:

1. International Defence & Security Exhibition, Spain: FEINDEF
2. Armed Forces Innovation Award
3. Women, Engineering and Defence (MID)

3. 2025 Activity

Throughout 2025, Fundación Feindef has been intensely active in strengthening knowledge, reflection, and dialogue on security and defence, consolidating its position as a meeting point for institutions, industry, academia, and society, and promoting initiatives, events, and projects that have fostered innovation, research, and cooperation as key drivers of economic, technological, and social progress.

■ 3.1. International Defence & Security Exhibition, Spain: FEINDEF

The FEINDEF International Defence & Security Exhibition, officially recognised as an International Exhibition by the Ministry of Economy, Trade and Business, has established itself, edition after edition, as a strategic platform and benchmark for the global defence and security ecosystem.

The fourth edition, held from 12 to 14 May 2025 at IFEMA Madrid, brought together companies, institutions, and organisations from around the world, offering a unique space to explore technological advances and comprehensive solutions in six strategic domains: land, sea, air, space, cyberspace, and the cognitive domain.

FEINDEF has become an essential meeting point for professionals, authorities, and experts, driving innovation, technology transfer, and international cooperation. It also contributes to strengthening the international standing of the Spanish defence and security industry, consolidating Spain's position as a key player on the global stage.

In addition to the commercial exhibition and technology demonstrations, the exhibition offers a programme of conferences, workshops, and networking opportunities that facilitate the establishment of synergies, the forging of strategic alliances, and the anticipation of trends in a rapidly evolving sector.





3.1.1. FEINDEF 25



3.1.1.1. Letter from the Secretary of State for Defence

The fourth edition of FEINDEF has reinforced its position as a showcase for the technological, industrial, and human capabilities of the Spanish defence sector. With more than 600 exhibitors, 91 official delegations, and representatives from 68 countries, FEINDEF has once again positioned our country on the international stage as a reliable, innovative partner that is fully committed to collective security.

The exhibition has highlighted the importance of an industrial and technological base that contributes decisively to the national economy. Major driving companies, together with a solid network of highly specialised SMEs, form a supply chain capable of generating wealth, quality employment, and territorial cohesion. In a complex geostrategic environment, this industrial strength constitutes a guarantee of strategic autonomy and response capacity. Complementing this is the sustained commitment to R&D&I, an indispensable element for developing critical technologies and projecting the Spanish industry globally.

FEINDEF has also proven to be a driver of talent. The increasing integration of young professionals, and especially women, whose presence is becoming increasingly decisive, reflects the evolution of a sector that is advancing with determination and leadership towards the future.

The next edition presents a valuable opportunity to consolidate the synergies generated, strengthen the international projection of the exhibition, and expand the areas dedicated to equal opportunities, innovation, and young talent. FEINDEF aims to maintain sustained growth, positioning itself alongside the leading international exhibitions, and to reinforce its status as a benchmark forum on the path towards a more integrated, robust European and Alliance defence that is better prepared for the challenges of the 21st century.

María Amparo Valcarce García

Secretary of State for Defence



3.1.1.2. Letter from the President

The fourth edition of FEINDEF has consolidated the Spanish defence industry as a thriving strategic pillar, demonstrating unprecedented technological, industrial and collaborative maturity. With record figures and outstanding international participation, the event has been a showcase for innovation, commitment and cooperation, reflecting not only the economic and technological potential of the sector, but also its value as a guarantor of sovereignty and security.

The participation of major companies, together with the essential role of SMEs and the growing visibility of female talent, reinforce an inclusive and robust vision of the future.

FEINDEF thus reaffirms its position as a catalyst for progress, public-private cooperation and international ambition, strengthening Spain's role in 21st-century defence.

Ángel Olivares

President of the Fundación FEINDEF



3.1.1.3. Message from the Vice-Presidents of the Fundación Feindef



The strong growth and positioning of FEINDEF and its industries over the last four editions reaffirm the recognition of the defence and security sectors as fundamentally strategic, playing an increasingly important role in the volatile world in which we live.

This gathering, which brought together key players in the industry, not only promoted technological exchange, but also the establishment of robust alliances capable of enhancing the international standing of our companies. The presence of ninety-one heads of international delegations, accompanied by their respective representatives and support staff, and the response of our industrial ecosystem, with a consolidated supply chain, demonstrate that Spain is now a premier, reliable, and competitive partner worldwide.

At TEDAE, we particularly value FEINDEF's ability, with public and private support, to promote cooperation, foster talent, and open new opportunities in global markets. Persisting on this path of innovation and collaboration is undoubtedly the greatest challenge and, at the same time, the guarantee of our sector's future leadership.

Ricardo Martí Fluxá

President of TEDAE
and Vice-President of the Fundación Feindef



The defence industry has responded unanimously not only to the uncertainty caused by the war in Ukraine, but also to the efforts of the Ministry of Defence to establish a suitable industrial and technological base that meets the needs of the Armed Forces in fulfilling their missions, even prior to the onset of this conflict, through the allocation of sufficient budgetary resources.

The success of FEINDEF 25 stands as proof of this response. As stated by the Secretary of State for Defence (SEDEF), María Amparo Valcarce García, FEINDEF has served as a great opportunity to align efforts and priorities in a complex and dynamic international environment.

Gerardo Sánchez Revenga,

President of AESMIDE
and Vice-President of the Fundación Feindef



3.1.1.4. Institutional Support

FEINDEF has enjoyed the institutional support of the Ministry of Defence since its inaugural edition in 2019, consolidating its position as a benchmark event that brings together the leading national and international institutions in the sector. The exhibition has reaffirmed the participation of key organisations, including the European Commission, through DG DEFIS and DG CONNECT; the Ministry of the Interior, represented by the National Police, the Civil Guard, and the Directorate-General for Civil Protection; the Ministry of Industry and Tourism, through ENISA; the Ministry of Economy, Trade and Enterprise, through ICEX; and the Ministry of Science, Innovation and Universities, through CDTI.

This list also includes organisations of particular relevance in the field of defence and security, such as the CNI and INTA, as well as leading international organisations and agencies, including the EDA, EUROPOL, NATO, OCCAR, and the UN. This broad institutional involvement not only highlights FEINDEF's inclusive nature, but also reinforces its position as a global benchmark forum, promoting cooperation, innovation, and knowledge exchange in the defence and security sectors.



3.1.1.5. Key Figures

General data and key event indicators

This edition established itself with outstanding figures that reflect the growth and relevance of FEINDEF. The exhibition occupied an exhibition area of 61,020 m², representing an increase of 53% on the previous edition, distributed across four halls: Hall 10 (21,600 m²), Hall 8 (16,200 m²), Hall 6 (10,800 m²) and Hall 4 (10,800 m²). These spaces hosted 628 exhibitors, including 211 international exhibitors, reinforcing the global character of the event. Furthermore, 91 heads of official delegations from 49 countries participated, along with 9 official bodies and 7 international halls, providing visibility, diversity and a marked international focus to the offerings showcased.

The geographical reach of the exhibition was also significant, with representation from 68 countries through companies and international delegations, confirming the global projection of FEINDEF and its ability to attract key players in the sector. Attendance exceeded 43,300 professionals, generating a dynamic environment conducive to the creation of business opportunities and the consolidation of strategic alliances.

The parallel programme included 55 activities, comprising round tables, conferences and colloquiums, which served as spaces for reflection, the exchange of ideas and knowledge transfer. This was complemented by unprecedented media coverage, with 192 media outlets accredited and 507 journalists in attendance, ensuring comprehensive coverage both nationally and internationally and consolidating FEINDEF's position as a global benchmark forum for defence and security.



Evolution of FEINDEF

Throughout its various editions, FEINDEF has experienced sustained and significant growth, consolidating its position as the leading defence and security exhibition in Spain and as a strategic international meeting point.

Attendance:

The evolution of the specialised audience demonstrates the growing relevance of the event. In 2019, attendance stood at 12,873; in 2021, 19,269; in 2023, 24,338; and in 2025, 43,323, a figure equivalent to the sum of the two previous editions and representing a cumulative increase of 237% over six years. This growth reflects FEINDEF's ability to attract a broad, diverse, and highly specialised audience, consolidating its status as a leading forum for the sector.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Attendees	12,873	19,269	24,338	43,323	+78%	+237%

Exhibition area:

The expansion of the area dedicated to exhibitors demonstrates the dynamism and international reach of the exhibition. From 12,000 m² in 2019, the area expanded to 28,000 m² in 2021, 40,000 m² in 2023, and 61,020 m² in 2025, with a net growth of 21,020 m², underscoring its importance and constant development. This evolution reflects the consolidation of FEINDEF as one of the world's leading defence exhibitions, with a comprehensive approach covering six strategic domains: land, sea, air, space, cyberspace, and the cognitive domain.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Exhibition Area (m²)	12,000	28,000	40,000	61,020	+53%	+409%

Exhibitors:

The number of exhibitors rose from 134 in 2019 to 311 in 2021, 438 in 2023, and 628 in 2025, representing a cumulative increase of 369%. The international dimension has been significantly strengthened, with 26 international exhibitors in 2019, 55 in 2021, 112 in 2023, and 211 in 2025; this represents an increase of 712% compared to 2019 and 88% compared to 2023, consolidating the exhibition's global reach.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Total Exhibitors	134	311	438	628	+43%	+369%
International Exhibitors	26	55	112	211	+88%	+712%



International Organisations:

The participation of international bodies, including leading organisations and agencies, has grown from 4 in 2019 to 9 in 2025, representing an increase of 125% and demonstrating the rising interest in FEINDEF.

In 2025, institutional presence was marked by representatives from the European Defence Agency (EDA), NATO, the European Commission, EUROPOL, and the United Nations.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
International Organisations	4	5	6	9	+50%	+125%

INTERNATIONAL ORGANISATIONS	
EDA	Director Industry, Synergies & Enablers (ISE)
EUROPEAN COMMISSION	DG Communications, Network, Contents and Technology (DG CONNECT)
EUROPOL	Project Manager of SIRIUS Project for EUROJUST
NATO	Military Deputy Director for DIANA
NATO	Asistant Secretary General – Defence Investment
NATO Communications and Information Agency	CTO NCIA
NATO Office of Resources	Head of the NOR CIS & Cyber Capabilities Branch
NATO Support and Procurement Agency	Commander of the Southern Operational Centre in Taranto (NSPA)
United Nations	Director of the Uniformed Capabilities Support Division

International Delegations

Delegations increased from 46 in 2019 to 75 in 2021, 92 in 2023, and 91 in 2025, representing a cumulative growth of 98% and consolidating the international dimension of the exhibition.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Heads of International Delegations	46	75	92	91	-1%	+98%



Countries Represented by Delegations

The number rose from 32 in 2019 to 39 in 2021, 47 in 2023, and 49 in 2025; this represents a cumulative increase of 53% compared to the inaugural edition in 2019.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Countries represented by Heads of International Delegations	32	39	47	49	+4%	+53%

Media Coverage:

Press coverage has grown exponentially, reaching 192 accredited media outlets and 507 journalists in 2025, ensuring FEINDEF's visibility on a national and international scale.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Accredited Media	ND	106	124	192	+55%	+81%
Accredited Journalists	156	228	310	507	+64%	+225%

Collectively, these figures confirm FEINDEF's status as a strategic platform for the global defence and security sector.





Profile of the official delegations in attendance

Regarding the institutional profile of the international delegations, the exhibition brought together high-level authorities, including Ministers, Secretaries of Defence, and Directors-General of Armaments, consolidating FEINDEF's position as a strategic global meeting point. Among the Ministers in attendance were the Ministers of Defence of Angola, Bolivia, Gabon, Guatemala, Mauritania, and the Republic of the Congo - the latter accompanied by the Deputy Prime Minister - as well as authorities from Senegal and representatives of strategic industries, underscoring the political and strategic importance of the event.

Secretaries and deputy defence ministers from countries such as Angola, the Philippines, Slovakia, Slovenia, Türkiye and Paraguay attended, as well as directors general and heads of armaments from Saudi Arabia, Brazil, Montenegro, Türkiye, France, Portugal, Latvia and Mexico also took part. This group was joined by representatives of international organisations such as NATO and the EDA, underlining the global dimension and institutional importance of FEINDEF as a platform for cooperation and dialogue in the defence and security sector.

International authorities in attendance:

8 Ministers

- Angola: Minister of Defence
- Bolivia: Minister of Defence
- Gabon: Minister of Defence
- Guatemala: Minister of National Defence
- Mauritania: Minister of Defence
- Republic of the Congo: Deputy Prime Minister and Minister of Defence
- Senegal: Minister of the Armed Forces
- Ukraine: Minister of Strategic Industries



6 Secretaries of State for Defence

- Angola: Secretary of State for Military Industry
- Philippines: Undersecretary for Acquisition and Resources Management
- Slovakia: State Secretary of Defence
- Slovenia: State Secretary of Defence
- Türkiye: Deputy Minister of National Defence
- Paraguay: Deputy Minister for the Armed Forces

11 Directors-General for Strategy and Innovation in the Defence Industry (DGEID) / National Armaments Directors (NAD)

- Saudi Arabia: Director of the General Directorate of Procurement Operations
- Brazil: Secretary of Defence Products (SEPROD)
- Montenegro: Director General of the Directorate for Logistics
- Türkiye: Vice President of the Defence Industry Agency (SSB)
- France: Director of International Development for the DGA
- Portugal: Deputy Director-General of National Defence Resources
- Latvia: Undersecretary of State for Logistics
- Mexico: Deputy Director General of Naval Armament (SEMAR)
- NATO: Assistant Secretary General for Defence Investment
- NCIA: Chief Technology Officer (CTO)
- EDA: Director of Industry, Synergies & Enablers (ISE)

3.1.1.7. Countries Represented

International participation in FEINDEF 25 comprised 68 countries, reflecting the international dimension and global reach of the event. This broad presence reaffirms the exhibition's role as a key meeting point for cooperation and technological exchange in the field of defence and security.

This participation was distributed among **49 official delegations** from countries such as Germany, Argentina, Saudi Arabia, Brazil, Canada, Colombia, the United States, Japan, Mexico, and the United Kingdom, among others, while **29 countries participated through exhibiting companies from the industry**, including Belgium, Denmark, the United Arab Emirates, Norway, the Netherlands, Sweden, and Türkiye, among others. Ten countries combined both forms of participation, featuring the simultaneous presence of official delegations and industry: Germany, Australia, Chile, Slovakia, France, Italy, Poland, the United Kingdom, Türkiye, and Ukraine, demonstrating the diversity and dynamism of international representation at the exhibition.

	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Countries Represented by Official Delegations	32	39	47	49	+4%	+53%
% of International Participation	19%	17%	26%	34%	+31%	+79%
Companies' countries of origin	11	19	25	29	+16%	+164%



COUNTRIES REPRESENTED IN FEINDEF 25		
COUNTRIES	COMPANIES	DELEGATIONS
GERMANY	X	X
ANGOLA		X
SAUDI ARABIA		X
ARGENTINA		X
AUSTRALIA	X	X
BANGLADESH		X
BELGIUM	X	
BOLIVIA		X
BRAZIL		X
BULGARIA	X	
CANADA		X
QATAR		X
CHILE	X	X
CYPRUS		X
SOUTH KOREA		X
COLOMBIA	X	X
CROATIA		X
DENMARK	X	
ECUADOR		X
USA	X	X
EGYPT		X
EL SALVADOR		X
UNITED ARAB EMIRATES	X	
SLOVAKIA	X	X
SLOVENIA	X	X
THE PHILIPPINES		X
FINLAND	X	
FRANCE	X	X
GABON		X
GREECE		X



COUNTRIES REPRESENTED IN FEINDEF 25		
COUNTRIES	COMPANIES	DELEGATIONS
GUATEMALA		X
HONDURAS		X
INDONESIA		X
IRELAND	X	
ITALY	X	X
JAPAN	X	X
JORDAN		X
LATVIA		X
LITHUANIA	X	
MOROCCO		X
MAURITANIA		X
MEXICO		X
MONTENEGRO		X
NORWAY	X	
THE NETHERLANDS	X	X
PARAGUAY		X
PERU	X	X
POLAND	X	X
PORTUGAL	X	X
UNITED KINGDOM	X	X
CZECH REPUBLIC	X	
REPUBLIC OF CONGO		X
ROMANIA	X	X
SENEGAL		X
SWEDEN	X	
SWITZERLAND	X	
THAILAND		X
TÜRKIYE	X	X
UKRAINE	X	X
VIETNAM		X
	29	49










3.1.1.8. International Halls

FEINDEF 25 featured seven international halls, reflecting the growing global reach of the exhibition and its ability to attract countries interested in strengthening their position in the field of defence and security. This year's edition featured the participation of Peru, Portugal, Türkiye, the Czech Republic, France, Colombia, and the United Arab Emirates, creating a diverse and representative international showcase.

Türkiye stood out as the country with the largest presence, with a broad business representation that included 28 stands and occupied an area of 1,281 m². The remaining countries occupied one or two stands each, with areas ranging from 36 to 95 m², except for the United Arab Emirates, which covered an area of 384 m².

In total, the international halls comprised 36 stands and a total area of 1,908 m². This participation demonstrated a high level of regional diversity and a growing interest in establishing new opportunities for industrial and technological cooperation. Among the countries present, only the Czech Republic had participated as an official exhibitor in the 2023 edition, underscoring FEINDEF's ability to attract new delegations and expand its international network.

International Halls	HALL	No. of stands	m ²
1	Peru 	1	36
2	Portugal 	1	40
3	Türkiye 	28	1281
4	Czechia 	1	36
5	France 	2	95
6	Colombia 	2	36
7	United Arab Emirates 	1	384
TOTAL		36	1908

In total, the international halls comprised 36 stands and a total area of 1,908 m². This participation demonstrated a high level of regional diversity and a growing interest in establishing new opportunities for industrial and technological cooperation. Among the countries present, only the Czech Republic had participated as an official exhibitor in the 2023 edition, underscoring FEINDEF's ability to attract new delegations and expand its international network.

3.1.1.9. Relations with the Industry

International delegations actively engaged with exhibiting companies, with a total of 885 visits recorded via the B2B platform; this figure represents only a fraction of the intense activity that took place during the exhibition. These interactions facilitated knowledge exchange, the exploration of collaboration opportunities, and the identification of synergies, underscoring global interest in the sector's industrial and technological capabilities.

Furthermore, the participation and diversity of official delegations and high-level authorities emphasised the international and strategic importance of FEINDEF, consolidating the exhibition as a leading forum for cooperation, innovation, and the global projection of the Spanish defence and security industry.



Indicator	2019	2021	2023	2025	Growth compared to previous edition	Cumulative growth 2019-2025
Attendees	12,873	19,269	24,338	43,323	+78 %	+237%
Exhibition area (m ²)	12,000	28,000	40,000	61,020	+53%	+409%
Total exhibitors	134	311	438	628	+43%	+369%
International exhibitors	26	55	112	211	+88%	+712%
International organisations	4	5	6	9	+50%	+125%
International delegations	46	75	92	91	-1%	+98%
Countries represented by delegations	32	39	47	49	+4%	+53%
Accredited media	ND	106	124	192	+55%	+81%
Accredited journalists	156	228	310	507	+64%	+225%



3.1.1.10. Sponsors

FEINDEF 25 received valuable support from our sponsors, whose vision and commitment were instrumental in elevating the exhibition to a new level. Thanks to their support, FEINDEF 25 has established itself as one of Europe's leading exhibitions, offering a unique showcase to drive industry development and promote strategic collaboration.

The support of these leading companies was structured across four levels of sponsorship:

Global: Airbus, EM&E Group, Grupo Amper, Grupo Oesía, Indra, and Navantia

Gold: Eurofighter, ICEX, ITP Aero, Telefónica, TRC, and UROVESA

Silver: Accenture, Accuris, Fernández Jové, IDV, Lockheed Martin, and Thales

General: AICOX, Akkodis, Einsa, GMV, MBDA, Palantir, and Sener

Innova Sponsors: Indra, Isdefe, monodon, and Wayra

PATROCINADORES FEINDEF 25

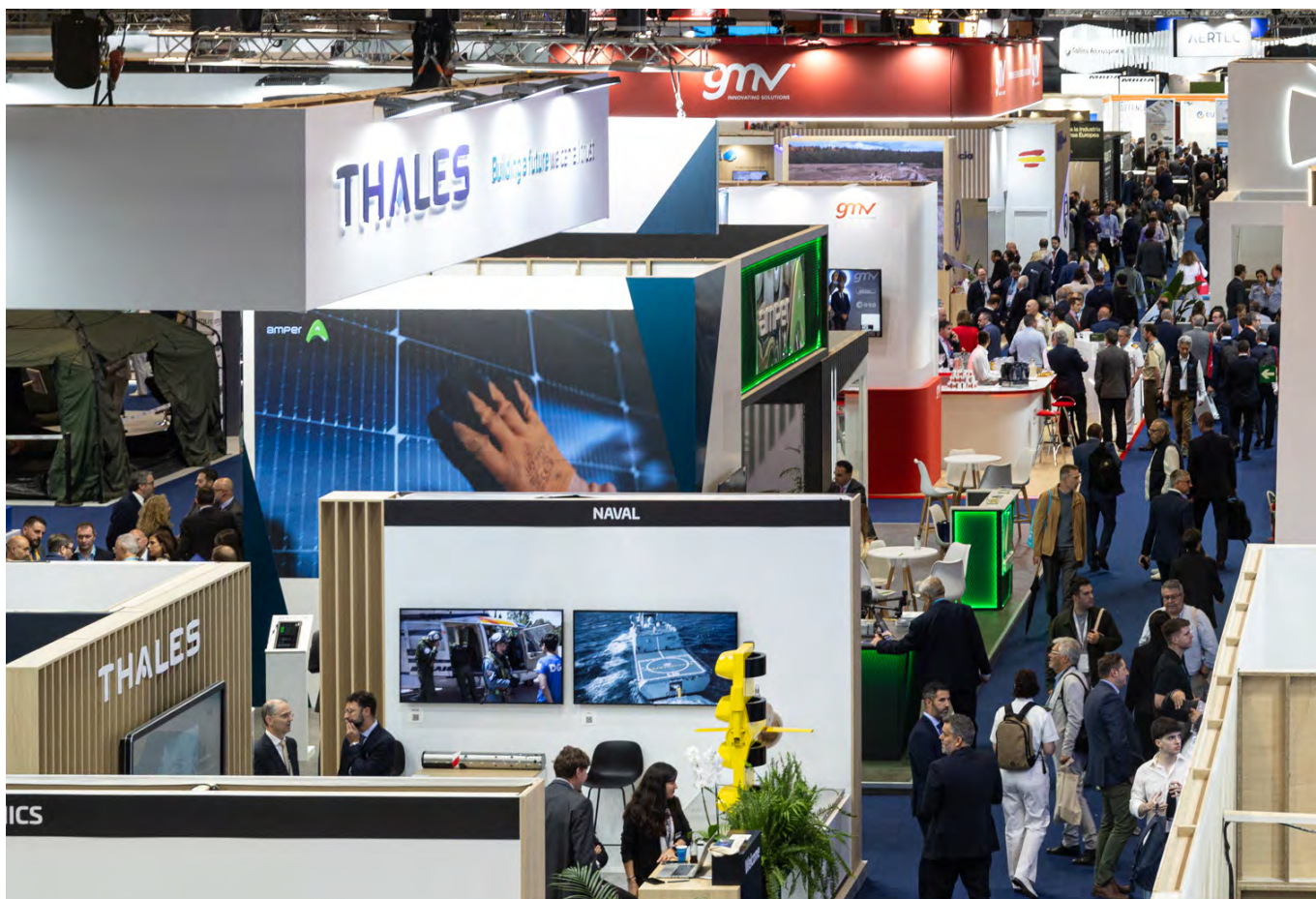
GLOBAL

GOLD

SILVER

GENERAL

INNOVA



3.1.1.1. Exhibitor Profile

The analysis of the sectors identified at FEINDEF 25 highlights a wide industrial and technological diversity, with a clear predominance of areas linked to manufacturing and systems integration. Among the most representative sectors are vehicles (123), systems and equipment (100), aircraft (39), consulting and engineering (37), and the auxiliary and spare parts industry (36), identified by exhibitors as their main activity. These figures demonstrate the consolidation of the traditional defence industry and its central role in the technological development of the sector.

Simultaneously, more specialised sectors such as missiles, electronic warfare, armaments, and infrastructure complement the landscape, reinforcing the high level of specialisation and technological innovation capacity of the companies present at the exhibition.

An analysis of representation by strategic area shows that the most prominent sectors were cybersecurity (575), security (246), naval vessels (206), C4ISR (185), field logistics (145), cyber defence (137), and helicopters (119). This distribution reflects the growing importance of critical infrastructure protection, Command and Control, and operational support, underscoring their status as key areas for national and international security.

Ultimately, this constitutes a cohesive and expanding industrial ecosystem, where innovation, cooperation, and technological development serve as the pillars of sustained growth for the defence and security sector.

View [the full list of exhibiting companies.](#)



List of Exhibitors

- 3E.
- 3M.
- 3M (INDIVIDUAL PROTECTION)
- 80% ELECTRIC
- AALBERTS ST TEY
- ABACO SYSTEMS - AMETEK
- ABACO SYSTEMS - AMETEK
- ABCONEX SOLUCIONES, S.L.
- ABRARESIST
- ACCENTURE
- ACEROS IMS
- ACCURIS
- ACK3 GLOBAL SOLUTIONS
- ACORDE
- ACREADARO TECNOLOGIA SA
- ADELTE TRANSPORTE Y SERVICIOS EFS S.L.U.
- ADEVEX
- ADLER INSTRUMENTOS
- ATL EUROPA - ADVANCED TELECOMMUNICATIONS LAMBDA EUROPA, SA
- AENIUM
- AERNNOVA
- AEROMARINE
- AERTEC
- AERYS
- AESMIDE
- AGENCIA DE SEGURIDAD Y EMERGENCIAS, MADRID 112
- AGM GLOBAL VISION LLC
- AIM INFRAROT-MODULE GMBH
- AICOX SOLUCIONES
- AIMPLAS
- AIR COMPRESSOR MPC
- AIRBUS
- AIRELECTRIC
- AIRTIFICIAL AEROSPACE & DEFENSE
- AITEX
- AITOR KNIVES
- GRUPO ÁLAVA
- AKKODIS
- ALCUPLA, S.A.
- ALFA BIENES Y SERVICIOS, S.L.
- ALFARIVER, S.L.
- ALIAS ROBOTICS
- ALISYS ROBOTICS
- ALPHA UNMANNED SYSTEMS
- ALSETEX
- ALTAIX ELECTRONICA, S.A.
- ALTEN
- ALTUS
- ALUFASE, S.A.
- ALU-STOCK
- AMAZON WEB SERVICES
- AMETEK INSTRUMENTOS SL
- AMPER
- AMPHENOL
- ANDALUCIA EMPRENDE FUNDACION PÚBLICA ANDALUZA
- ANEEL ESCUDO Y BORDADOS SL
- ÁNGEL GABARDÓS GALINDO SUCESORES, S.L.
- ANSYS
- ANZEN ENGINEERING
- APLITEC, S.L.
- APPI TECHNOLOGY
- APPLUS+ LABORATORIES
- ARASAF INDUSTRIAL, SL
- ARCTEST
- ARAGÓN EXTERIOR - AREX
- ARMADA
- ARPA EQUIPOS MÓVILES DE CAMPAÑA
- ARQUIMEA
- ARSOFT
- ARTEIXO TELECOM
- ASCH INFRAESTRUCTURAS Y SERVICIOS
- ASECOS
- ASIME | GALICIAN ASSOCIATION OF METAL INDUSTRIES AND ASSOCIATED TECHNOLOGIES
- ASMAR SHIPYARDS
- ASTURIAS HUB DEFENSA
- ASTUTE ELECTRONICS LTD
- ATOS
- AUDIOBUS SL
- AUTEK INGENIERÍA
- AVAS METAL SAN TIC AS
- AXON' CABLE



List of Exhibitors

- CÓRDOBA CITY COUNCIL
- AZIMUT
- B2SPACE
- BAL SEAL ENGINEERING BV
- BEAMAGINE
- BERTEN
- BERTRANDT
- BESSEL SA
- BEYONDCOMPOSITE
- BIBUS SPAIN
- BIOMETRIC VOX
- BLANCH INTERNACIONAL
- BOLD
- BOMBARDIER DEFENSE
- BOSADO SL
- BRIO ULTRASONICS
- BROLIS SEMICONDUCTORS
- BUFF® SAFETY
- CADAMADRID
- CAETRA
- CALZADOS ROBUSTA
- CARTAGENA CHAMBER OF COMMERCE
- CANIK
- CANON ESPAÑA
- CAPGEMINI
- CASCO ANTIGUO COMERCIAL S.L.
- CASEMEDIA
- CATEC
- CAUCHOS PUNTES
- CENTRO TECNOLÓGICO DEL MÁRMOL, LA PIEDRA Y MATERIALES DE LA REGIÓN DE MURCIA
- CENTRO TECNOLÓGICO DEL METAL DE LA REGIÓN DE MURCIA
- CENTRO TECNOLÓGICO NAVAL Y DEL MAR DE LA REGIÓN DE MURCIA
- CENTUM
- CENVALSA
- CES ARMOUR
- CHORA
- CINTRANAVAL SHIP DESIGN
- CIPHERBIT GRUPO OESÍA
- CISCO SYSTEMS
- COVERT INTELLIGENT SECURITY SYSTEMS
- CIVILIO SISTEMAS DE INFORMACIÓN PARA LA RESPUESTA Y GESTIÓN DE CRISIS
- CLIA SISTEMAS
- CLIMADEF PROYECTOS DE CLIMATIZACIÓN S.L.L
- CLUSTER DE LA INDUSTRIA DE DEFENSA
- CM COMPUTER
- CNIM SYSTÈMES INDUSTRIELS
- COBRA AERONAUTICS
- CONVERZAR
- COMOTI
- COMPAÑÍA ESPAÑOLA DE SISTEMAS AERONAÚTICOS
- COMPAÑÍA ESPAÑOLA DE TÉCNICA AERONAUTICA SA
- COMPOSHIELD
- CONSUEGRA S. COOP. MAD
- GAVIONES FLEXIBLES CONTFLEXDIQUE
- CORIMEC SPA
- CORVUS
- CREAFORM
- CRISTANINI
- CSA
- CT
- CTECH
- CTAG CENTRO TECNOLÓGICO DE AUTOMOCIÓN DE GALICIA
- CURTISS-WRIGHT
- CZECHTRADE
- DAGARTECH | CUSTOM ENERGY SOLUTIONS
- DAKTRONICS
- DAMI CHEMICAL TECHNOLOGIES, SLU
- DANIMA ENGINEERING
- DANOBAT
- DASSAULT SYSTÈMES
- DATATEC INSTRUMENTS
- DAUNERT S.A.
- DDC/PDC
- DEKRA TESTING AND CERTIFICATION
- DERICHEBOURG AERONAUTICS SERVICES SPAIN SL
- DESTINUS SPAIN SL



List of Exhibitors

- DETEGASA
- DHV TECHNOLOGY
- DIAPOL
- DICOMOL
- DINUMEC, S.L.
- DIPUTACION PROVINCIAL DE JAEN
- DISTEVI GROUP
- DOK-ING LTD
- DONALBA
- DRONESHIELD
- DRONETOOLS
- DSV-SLI
- DUMA ENGINEERING GROUP SL
- EBROACERO, S.A.
- ECAPTUREDTECH
- ECOLOG INTERNATIONAL
- EDAG ENGINEERING SPAIN S.L.
- EDINAF
- EGATEL
- EHAFF
- EINSA
- EIBAR PRECISION CASTING SL (EIPC)
- ARMY
- AIR AND SPACE FORCE
- EKIPOL
- EL CALDÉN TACTICAL
- EL SIGLO 1870, S.L.
- ELECTRONIQUEL
- ELEMENT MATERIALS TECHNOLOGY SEVILLE, S.L.
- ELIGIO RE FRASCHINI S.P.A.
- ENGINEERED LAND SYSTEMS SL
- ELMEQ
- ELNO
- EM&E GROUP
- EMYCSA - REALSIMULATOR
- ENCAJA
- EOS
- EPC
- EPICOM, S.A.
- EQUIMODAL
- ERMEC
- ESIM GAMES DEUTSCHLAND GMBH
- ESRI ESPAÑA SOLUCIONES GEOESPACIALES SL
- ESSETI SRL PRINTED CIRCUIT BOARD
- ESTELLER
- ETEL 88
- ETRA AIR S.L.
- EUROFIGHTER JAGDFLUGZEUG GMBH
- EUROPAVIA
- EVORA IT SOLUTIONS
- EXAIL
- EXCELENCIA TECH
- EXCELTIC
- EXCEM TECHNOLOGIES
- EXIDES, SL
- EXPLOSION
- EXTREMADURA AVANTE SAP SLU
- EXTRON
- FABITIVE, SL
- FABRICA DE MUNICIONES DE GRANADA S.L.U.
- FABRICAIR
- FACET BOX SLU
- FACTOR INGENIERÍA Y DECOLETAJE, S.L.
- FAL SEGURIDAD
- FALKEN
- FAYMM
- FCAS
- FECSA
- FERCHAU SPAIN SLU
- INDUSTRIAS FERRI, S.A.
- FERRIMAX
- FIGLES CONSULTING
- FERNANDEZ JOVE COMERCIAL E INGENIERIA
- FIDAE 2026
- FINITEC ELECTROLISIS
- FN HERSTAL
- FNSS SAVUNMA SISTEMLERI A.S.
- FORCIT DEFENCE
- FRIZONIA
- FUNDACIÓN CÍRCULO DE TECNOLOGÍAS PARA LA DEFENSA Y LA SEGURIDAD
- FUNDACIÓN PARA EL CONOCIMIENTO MADRI+D



List of Exhibitors

- FUNDITEC
- FUTURE SPACE, S.A.
- GABADI
- GAHN
- GALEO TECH
- GAM
- GAPTEK
- GAUZÓN IBÉRICA S.L.U.
- GEALIA
- GECI ESPANOLA AEROSPACE SOLUTIONS
- GEMINYS SL
- GENASYS
- GENERAL ATOMICS AERONAUTICAL SYSTEMS
- GENERAL DYNAMICS EUROPEAN LAND SYSTEMS SANTA BARBARA SISTEMAS
- GETAC TECHNOLOGY CORPORATION
- GETAFE INICIATIVAS, S.A.
- GHENOVA INGENIERIA SL
- GHOSTHOOD
- GLENAIR
- GLOBAL WIRE HARNESS DEFENSE AVIATION INC.
- GMV
- GMS PLESIUM
- GOCAR ELECTRONIC
- GOLDIEARMS
- GRADIANT
- GRUPO AMYGO
- GRUPO CONTACT FITNESS S.L.
- GRUPO EDEFA
- GRUPO ZELENZA
- GUANTES ARRIBAS
- HARMONIC DRIVE ESPAÑA. S.L.U.
- HAVELSAN
- HEGAN - BASQUE AEROSPACE CLUSTER
- METALMECANICAS HERJIMAR, SL
- HERMANOS ALFARO
- HEXAGON
- HI IBERIA
- HISDESAT, SERVICIOS ESTRATÉGICOS
- HISPAMAST
- HISPANO VEMA S.L.
- HISPARASA
- HOLÍK INTERNATIONAL
- HUTCHINSON
- IBATECH TECNOLOGIA SLU
- IBERIA COMPOSITECH
- IBEROPTICS SISTEMAS ÓPTICOS S.L.
- ICEYE
- ICOMPPLUS ELECTRONICS
- IDBOTIC
- IDONIAL
- IVECO DEFENCE VEHICLES
- IMPLEMENTOS-WARN
- INDRA
- IMSDRONES
- INETUM
- INFINITIA INDUSTRIAL CONSULTING
- INFODEFENSA.COM
- INFRANOR
- INMAPA
- INNOVATION FOR SHELTER, S.L. (I-4S)
- INSTALAZA
- INSTER GRUPO OESÍA
- INSYTE
- INTA (INSTITUTO NACIONAL DE TÉCNICA AEROESPACIAL)
- INTEGRA INTERNATIONAL SRL
- INTEGRACION TECNOLOGICA EMPRESARIAL, S.L.
- INTEGRASYS SA
- INTEGRIS COMPOSITES
- INTERFACE CONCEPT
- IPEK
- IQUA ROBOTICS
- IRAUNDI
- ITG
- ITM SEGURIDAD
- ITP AERO
- ITS DEFENSE
- ITURRI
- JAVDES
- JIN
- JOHN COCKERILL DEFENSE
- JONATHAN GROUP DEFENSE
- KA SAFE ENGINEERING



List of Exhibitors

- KAIRÓS
- KALYANI STRATEGIC SYSTEMS LIMITED
- KAMAN SPECIALTY BEARING AND ENGINEERED PRODUCTS GMBH
- KAPPA OPTRONICS S.L.
- KARMETAL SAVUNMA MÜHIMMAT SILAH TEKNOLOJILERI SANAYI VE DIS TIC A.S.
- KAWASAKI HEAVY INDUSTRIES, LTD
- KEPAR ELECTRÓNICA
- KINNETEK
- KONGSBERG DEFENCE & AEROSPACE
- KORTA
- KRC ESPAÑOLA
- KUANTEK ELEKTRONIK A.S.
- KUEHNE+NAGEL- BESS GROUP
- LAGUN MACHINE TOOLS
- LANCO GROUP GMBH
- LAZPIUR
- LECITRAILER DEFENCE
- LEJARAZUSPORT.COM
- LEMAR LEBEN GROUP S.L.
- LEMO CONNECTORS
- LEONARDO
- LEUPOLD
- LINEAS Y CABLES, S.A.
- LOCKHEED MARTIN
- LUPEON
- LYNRED
- MADES
- MADIT METAL
- MAKINE VE KIMYA ENDÜSTRISI AS
- MANDO CONJUNTO DEL CIBERESPACIO (MCCE)
- MANN+HUMMEL IBÉRICA
- MARINE INSTRUMENTS
- MASTER BATTERY
- MASTERTENT
- MATISEC
- MAXWELL APPLIED TECHNOLOGIES
- MBDA
- MECÁNICAS BOLEA, SA
- MECÁNICA DE PRECISIÓN TEJEDOR
- MECANUS
- MENPRO
- MERCURY SYSTEMS
- METAL TECHNOLOGY GROUP ANGEL BALEVSKI HODING AD
- METALOGRAFICA DE LEVANTE, SA
- MG JACKETS CARTAGENA, SL
- MICHELIN
- MIGERTRON SEGURIDAD S.L.
- MILEXIA IBERICA SA
- MILITEX
- KEYVAN AVIATION
- MINISTERIO DE DEFENSA
- MINISTERIO DE DEFENSA DE LA REPUBLICA DEL PERU
- MIRANDA SPÓLKA Z O.O.
- MODISPREM S.A.
- MOUNT SYSTEM
- MULTIVERSE COMPUTING
- MZD DEFENCE CABLING SOLUTIONS
- NABLA SOLUTIONS
- NAMMO A.S
- NANOCARBONIDS, SL
- NARWHAL BOATS S.L.
- NAVANTIA
- NAVALIA
- NEORADIX SOLUTIONS
- NERO INDUSTRIES
- NETMETRIX SOLUTIONS S.L.
- NEXT LEVEL TECHNOLOGIES
- NIASA
- ZEPELIN S.R.O.
- NUROL MAKINA UK LIMITED
- NORISPAN
- NOVACAVI
- NOVATRONIC SISTEMAS
- NTGS
- NTI
- NUNSYS GROUP
- NUROL MAKINA
- NUROL MAKINA HUNGARY LTD.
- NVECTECH PL
- NIGHTVISION LASERS SPAIN, S.L.
- OCTOPUS ROBOTICS



List of Exhibitors

- OEMDS
- GRUPO OESÍA
- INDUSTRIAL OLMAR, S.A.
- ORACLE
- ORBITAL SISTEMAS AEROSPAZIALES SLU
- ORBOTIX TECHNOLOGIES SPAIN SL
- ORTEC ENGINEERING
- OVERVOXT
- OXIPLANT
- PALANTIR TECHNOLOGIES SPAIN S.L.
- PALS ELEKTRONIK SAN VE TIC A.S.
- PANASONIC CONNECT EUROPE SUCURSAL EN ESPAÑA
- PATRIA
- PAUKNER DEFENSE & SECURITY
- PBS GROUP
- PEI-GENESIS
- PELI PRODUCTS
- PHILIPS
- PIEDRAFITA SYSTEMS, S.L.
- PIELCU S.L.
- PILATUS AIRCRAFT LTD
- PIXELSHUB
- PLAESA
- PLD SPACE
- PLUS ULTRA TACTICAL RESCUE
- PRACTIKA
- PRESIDENCY OF THE REPUBLIC OF TÜRKIYE - SECRETARIAT OF DEFENCE INDUSTRIES
- PRISMACIM EFFORT SL
- PROACTIVANET
- PROCESIA
- PROERSYS
- PROMEGA
- PRONIMETAL
- QARTIA SMART TECHNOLOGIES, SL
- QUEST GLOBAL
- RAMOS STS® DESUL®
- RAPIDFORT
- RAY SERVICE, A.S.
- REKORD HALE NAMIOTOWE SP. Z O.O.
- RELSUM HEREDEROS, S.L.
- RENISHAW
- REPSOL S.A.
- RESCUE CENTER112
- RESORTES GALICIA
- RF ESPAÑOLA, S.A.
- RHEINMETALL EXPAL MUNITIONS
- RLS D. O. O.
- ROAL
- ROHDE & SCHWARZ
- ROKETSAN
- S2 GRUPO
- SAAB AB
- SAAB BOFORS TEST CENTER
- SABORIT INTERNATIONAL S.L.
- SAES-S.A-ELECTRONICA SUBMARINA-S.M.E.
- SAFRAN ELECTRONICS & DEFENSE ESPAÑA
- SAGRES S.L.
- SAINSEL SISTEMAS NAVALES S.A.U. S.M.E.
- SAPA
- SARSILMAZ SILAH SANAYI A.S.
- SATEC
- SATLANTIS
- SAVRONIK A.S.
- SBP | SANDMAIR, BOEHLER & PARTNER, S.L.
- SISTEMAS DE INTERCONEXIÓN S.A.U.
- SCHOTT AG
- SEPTENTRIO NV
- SDT SPACE AND DEFENCE TECHNOLOGIES
- SECRETARY OF STATE FOR SECURITY (MINISTRY OF THE INTERIOR)
- SECTRA
- SENSA SOLUTIONS S.L.
- SEKUENS
- SENER
- SERMIPOL TECNOLOGÍA DE DEFENSA S.L.
- SERVITRON
- SICH UKRAINE, LLC
- SICNOVA
- SIM-ON SIMULACIÓN,S.L.
- SIMTEK SIMULATION TECHNOLOGIES
- SITEP
- SKYLIFE ENGINEERING, S.L.
- SERVICIOS Y LOGISTICA DE RESCATE S.L. (SLRESCUE)



List of Exhibitors

- SMARTLOG
- SMS - SISTEMAS MISILES ESPAÑA
- SOCITEC
- SOLCERA ADVANCED MATERIALS
- SOLIANI EMC S.R.L.
- SONY EUROPE B.V SUCURSAL EN ESPAÑA
- SPANSET, S.A.
- SPINNER GMBH
- STAHLWILLE ESPAÑA
- SUBMĚTRIKA
- SUNFIBRE
- SURCONTROL INSTRUMENTACIÓN Y CONTROL DEL SUR S.L.
- SVELT
- SVMAC
- SYNNECT
- SYVALUE S.L.
- AREX -ARAGÓN EXTERIOR
- TARGET TECNOLOGÍA
- TCH SPAIN
- TEXTIL SANTANDERINA, S.A.
- TECHNOLOGY & SECURITY DEVELOPMENTS
- TECNASA | COECA
- TECNESIS
- TECNOBIT - GRUPO OESÍA
- TECNOVE SL
- TECNOLANEMA
- ASOCIACIÓN ESPAÑOLA DE TECNOLOGÍAS DE DEFENSA, AERONÁUTICA Y ESPACIO (TEDAE)
- TEK CAN GRUP
- TELEFÓNICA
- TEKOM SAVUNMA VE HAVACILIK SANAYI A.S.
- TESS-DEFENCE
- THALES
- TITANIUM INDUSTRIAL SECURITY
- TONOLI IMPIANTI SRL
- TRC
- TRAKA IBERIA, GESTIÓN DE LLAVES Y RECURSOS SLU
- TRESCA
- TREXON
- TRIGO ADR IBERIA S.L.
- TTT GROUP
- TURKISH AEROSPACE
- UAV NAVIGATION - GRUPO OESÍA
- UCALSA, S.A.
- UDIM SUMINISTROS Y SERVICIOS SL
- UGT FICA
- ULAK COMMUNICATIONS INC
- GRUPO UNCETA
- UNDERHEAT - PRENDAS REFRIGERANTES
- UNIDAD MILITAR DE EMERGENCIAS
- UPLIFTING
- ENGRANAJES URETA
- UROVESA
- UTEK
- UTILIS, S.A.S.
- CONECTORES Y CABLES VAHER, S.L.
- VANGUARD MARINE LDA
- VECTORNAV TECHNOLOGIES
- VENCO ELECTRÓNICA S.A.
- VIASAT
- VIMAD GLOBAL SERVICES, S.L.
- VIPULSE TECHNOLOGY
- VITEC
- VIKING LIGHTING
- VOLO KOMPOZIT VE MÜHENDISLIK LTD. STI
- VQ COMMUNICATIONS
- VULKAN ESPAÑOLA S.A.
- W.L GORE Y ASOCIADOS, S.L.
- WEHL & PARTNER ADVANCED MANUFACTURING
- WILLBRANDT KG
- YILMAZ MAKINA
- ŽDAS, A.S.
- PROERSYS SLP
- ZFOAM
- ZODIAC MILPRO



3.1.1.12. Attendee Profile

FEINDEF attendees hail from a wide and diverse range of backgrounds, including government officials, military and security leadership, representatives of international organisations and, notably, professionals from the defence and security sector. The latter included both executives from major companies and management from SMEs, whose role is fundamental in driving innovation, cooperation, and technological development in the industry.

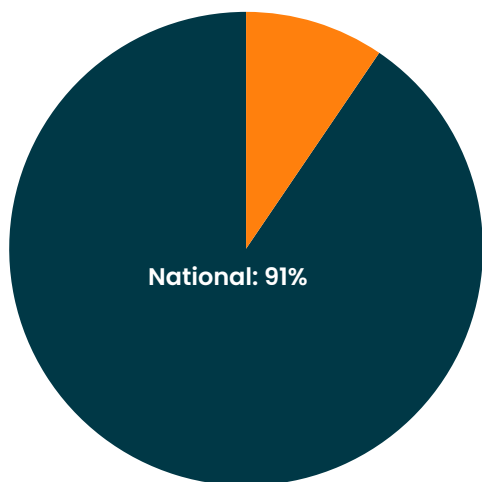
Attendees included authorities from various ministries, including Defence, the Interior, Industry, Trade and Tourism, Science, Innovation and Universities, Foreign Affairs, and Economy, as well as heads of international delegations, government authorities, and representatives of the Armed Forces and Security Forces from different countries. In addition, senior officers from the Defence Staff, the Army, Navy, Air and Space Force, as well as the Civil Guard, National Police, and Civil Protection participated.

The event also brought together ambassadors, military attachés, and interior advisers accredited in Spain, together with official representatives of international agencies and organisations, consolidating the institutional and strategic nature of the exhibition. Furthermore, FEINDEF was attended by senior executives, professionals, and organisations from the sector, as well as sales and purchasing managers from companies, promoting networking and business opportunities.

The geographical origin of the attendees also reflected the national and international scope of the exhibition. At a national level, 19,004 attendees (91%) were registered, with broad representation from all Autonomous Communities and a particular concentration in the Community of Madrid, which accounted for 16,162 attendees (85%). This was followed by Andalusia, Catalonia, the Basque Country, and the Valencian Community, as well as significant participation from the rest of Spain, demonstrating the widespread interest in the sector. At an international level, there were 1,995 attendees (9%), with a notable presence from Europe accounting for 1,364 attendees (68%), followed by the Americas with 298 (15%), Asia with 296 (15%), Africa with 30 (2%), and Oceania with 7 (0.4%); these figures highlight the global reach of the event and its ability to attract organisations and delegations from all five continents.

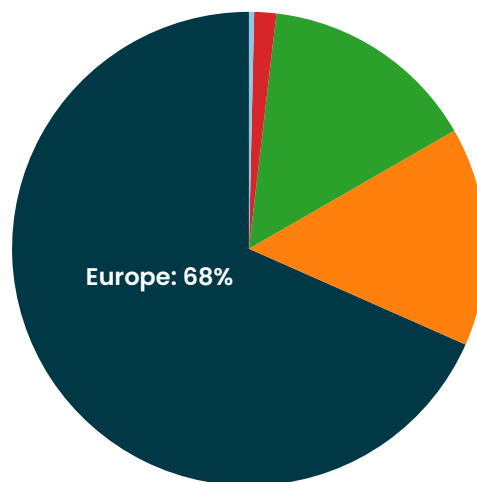
Geographical origin

- National: 19,004 (91%)
- International: 1,995 (9%)



Geographical origin - ABROAD

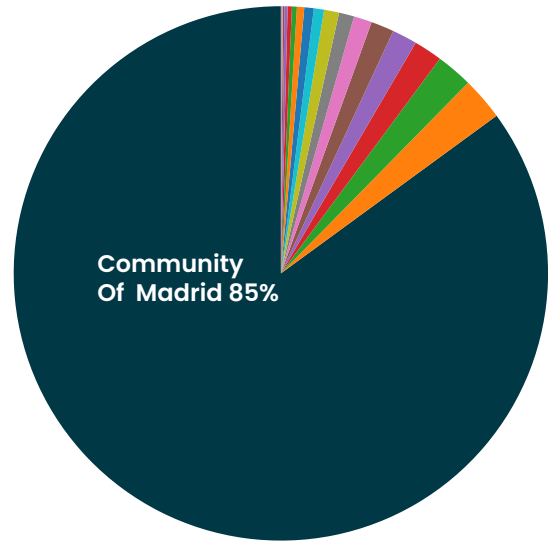
- Europe: 1,364 (68%)
- The Americas: 298 (15%)
- Asia: 296 (15%)
- Africa: 30 (2%)
- Oceania: 7 (0.4%)





Geographical origin - NATIONAL

Community of Madrid	16,162
Andalusia	494
Catalonia	420
Basque Country	328
Valencian Community	287
Aragon	265
Castile-La Mancha	208
Galicia	175
Castilla y Leon	173
Principality of Asturias	117
Region of Murcia	109
Cantabria	84
Navarre	57
Extremadura	48
Canary Island	36
La Rioja	19
Balearic Islands	14
Melilla	7
Ceuta	1



3.1.1.13. Experience the static exhibition hall

The latest edition of FEINDEF stood out for the addition of a static display area, designed as one of the most important and distinctive features of the exhibition. FEINDEF's aim with this space was to present systems in a comprehensive manner, offering attendees the opportunity to observe and understand the most advanced technological capabilities in the sector first-hand.

To promote the presence of these systems, an impressive and accessible space was designed to facilitate exhibitor participation, creating a more intimate and tangible exhibition environment. The excellent reception led to significant demand from exhibitors for the next edition, which will result in a significant increase in the area allocated to this format and confirms its relevance within the exhibition.

The display allowed attendees to examine land, naval, and air platforms, as well as Command and Control systems up close, offering a comprehensive overview of their operation and their contribution to current and future defence challenges. Simultaneously, strategic innovations were showcased in areas such as cybersecurity, artificial intelligence, and advanced logistics, along with solutions focused on sustainability and dual-use technology, demonstrating the sector's ability to make an impact in both military and civilian applications.

The positive reception of the static display confirms its importance as a distinctive feature of FEINDEF, consolidating its role as a benchmark forum for industry, institutions, and professionals in the field of defence and security.





3.1.1.14. Innova Space

Designed to highlight the defence industry's ongoing commitment to innovation and technological progress, the Innovation Space was established as a key forum within FEINDEF.

Promoted by the Subdirectorate General for Planning, Technology and Innovation (PLATIN) of the Ministry of Defence and by the state-owned company Ingeniería de Sistemas para la Defensa de España (ISDEFE), and sponsored by ISDEFE, Indra Group, Microsoft, Monodon, and Wayra, the Innova Space hosted a comprehensive programme of conferences, roundtables, and specialised workshops.

The Innova Space thus established itself as a meeting point where institutions, companies, and entrepreneurs gathered to drive open innovation, promote enabling technologies, and foster the development of specialised talent in the field of defence and security.

The forum's primary objectives were to contribute to the consolidation of the defence industry as a national and international benchmark in innovation and entrepreneurship regarding dual-use solutions; to stimulate a culture of research, innovation, and entrepreneurship through knowledge transfer; to strengthen networks between stakeholders with common interests; and to support start-ups and entrepreneurs by providing them with the opportunity to present their projects to established institutions and companies.

Furthermore, the start-up ecosystem played a prominent role, featuring elevator pitch sessions to present projects to companies and investors, as well as matchmaking activities that facilitated one-to-one meetings with established companies and investment funds, fostering synergies and collaboration opportunities.

Thus, the Innovation Space reinforced FEINDEF's role as a driver of innovation and a key platform for strengthening the entrepreneurial ecosystem in the fields of defence and security.



3.1.1.15. Assessment

To evaluate the perception and experience of participants in the fourth edition of FEINDEF, and as part of a continuous improvement process aimed at optimising the organisation of future editions, surveys were conducted among both exhibiting companies and attendees.

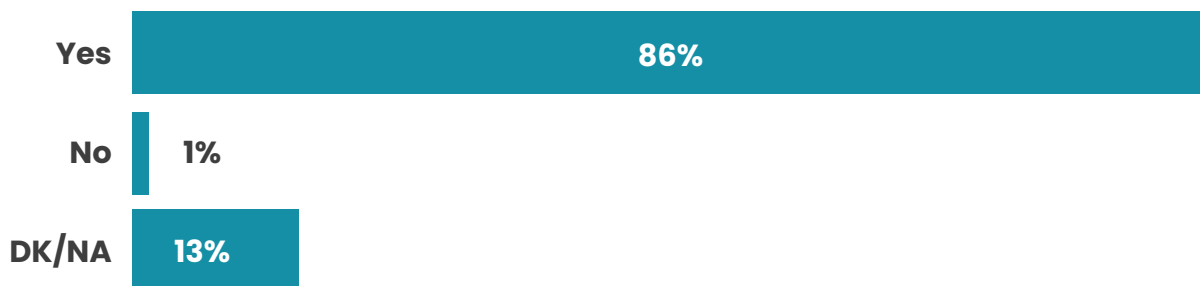
The analysis of the results revealed a high level of satisfaction and a willingness to participate in future editions.

Exhibitors:

When asked about their participation in the next edition of FEINDEF, 86% confirmed their participation, while 1% stated they would not participate and 13% were undecided (DK/NA); these figures reflect a majority interest in continuing to support the event.

The results confirmed a highly positive assessment of FEINDEF among participants, cementing its place as a key forum for professional networking, innovation and the development of young talent in the sector.

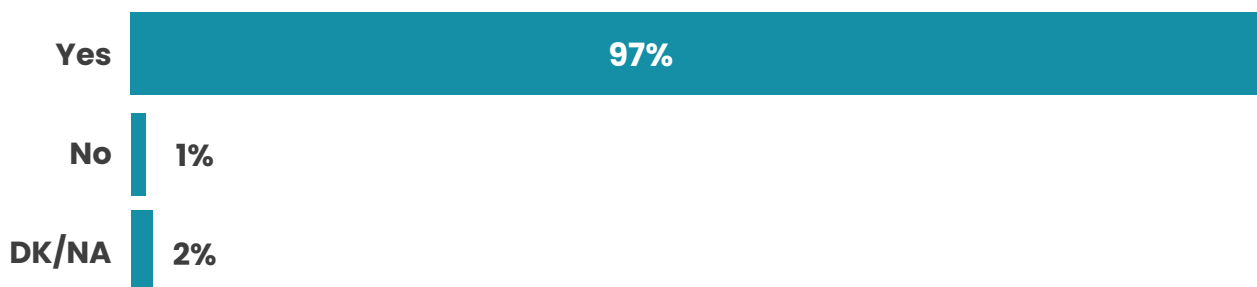
Would you participate in the next edition of FEINDEF?



Attendees:

When asked whether they would recommend FEINDEF to other industry professionals, 97% confirmed they would, demonstrating a high level of satisfaction with the experience. Only 1% stated they would not recommend it, while 2% offered no opinion.

Would you recommend participating in FEINDEF to sector professionals?



Overall, the results confirm that FEINDEF continues to be highly valued by participants, consolidating its position as a leading forum for professional interaction, innovation, and the development of young talent in the sector.



3.1.1.16. Programme of Activities

Day One

FEINDEF 25 OPENING CEREMONY

The fourth edition of FEINDEF, Spain's International Defence and Security Exhibition, opened with a clear message: defence and security are fundamental pillars of peace, well-being, and freedom. Officially recognised as an International Exhibition by the Spanish Ministry of Economy, Trade and Business, FEINDEF has established itself as one of the world's leading defence exhibitions and a key meeting point for governments, industry, academia, and international organisations, reinforcing its strategic reach and global influence.

The opening speech highlighted the strategic role of FEINDEF 25 within a complex geopolitical context, where Europe is strengthening its defence autonomy and NATO plays an essential role in global stability. The exhibition covers six key domains: Land, Sea, Air, Space, Cyberspace, and Cognitive; and promotes internationalisation, technological innovation, and the strengthening of international alliances.

The President of the Fundación FEINDEF, Ángel Olivares, described the exhibition as a space open to the world, reflecting the strength, values, and potential of the Spanish defence and security industry. He also called for strengthening multilateralism and international justice, citing Kennedy to emphasise shared humanity as the basis for peace and cooperation.





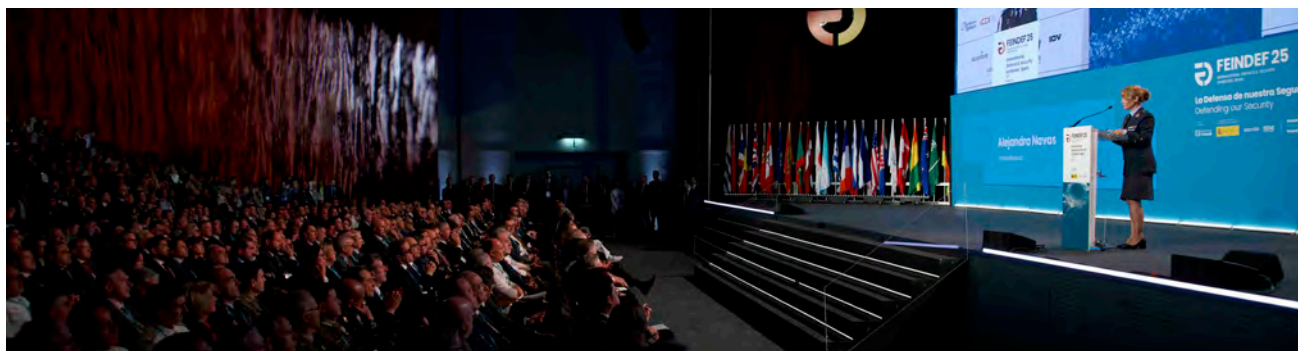
Special recognition was given to the work of the Founding Patrons of the Fundación Feindef: Mr Ricardo Martí Fluxá, President of TEDAE; Mr Gerardo Sánchez Revenga, President of AESMIDE; and Ms María Amparo Valcarce, Secretary of State for Defence.

In his speech, Gerardo Sánchez Revenga emphasised that technology is a key factor in all sectors, including defence. He noted that technological innovation provides companies with a competitive advantage and highlighted that the defence industry, represented by AESMIDE, has successfully adapted to technological change and transformation processes, actively contributing to the development of strategic capabilities and the modernisation of the sector.

Ricardo Martí Fluxá, President of TEDAE, stated that defence is not an expense, but an investment in freedom, security, and stability for future generations. He expressed his pride in the innovation of the companies present at FEINDEF 25, which contribute value, knowledge, and solutions to strengthen the security of Europe and the Atlantic Alliance. He also stressed the need for profound strategic awareness in a world marked by geopolitical tensions, the transformation of the international order, and hybrid threats, recalling that defence is essential to safeguard our freedoms, protect democracy, and preserve our way of life.

This edition also highlighted the economic and technological contribution of the Spanish industry, which contributes more than €17 billion to GDP and generates more than 200,000 jobs, cementing its position as the fourth largest defence industry in Europe and the eighth largest exporter worldwide.

The event demonstrates Spain's firm commitment to innovation, international cooperation, and the strengthening of defence capabilities as a guarantee of global security.



You can see this content here

https://www.youtube.com/live/iCMiCBEmal?si=_Mc9GsHhOzv-AgZ4



ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“Technological Challenges and Operational Transformation within the Armed Forces (FAS)”

Moderator:

Mr Carlos Franganillo Hernández, Journalist

Speakers:

- **General Amador Enseñat y Berea**, Chief of Staff of the Army (JEME)
- **Admiral General Antonio Piñeiro Sánchez**, Chief of Staff of the Navy (AJEMA)
- **General Francisco Braco Carbó**, Chief of Staff of the Air and Space Force (JEMA)

The conference programme of FEINDEF 25 commenced with the participation of the Chiefs of Staff of the Spanish Army and Navy. Under the title “Technological Challenges and Operational Transformation within the Armed Forces,” the session analysed the principal challenges and opportunities arising from the current technological revolution within defence.

The discussion opened with a broad question regarding the integration of new technologies into military forces. General Enseñat made a distinction between emerging technologies and disruptive technologies, noting that the latter fundamentally reshape operational practices and, as such, have a direct impact on military doctrine and strategic planning. He underscored the essential role of the Training and Doctrine Command as a key driver of knowledge management, drawing upon systematic observation, experimentation, specialist publications, and lessons-learned analysis. General Enseñat also highlighted the growing importance of artificial intelligence in enhancing decision-making processes and affirmed that digital transformation must ultimately translate into operational superiority on the battlefield.

Admiral General Piñeiro situated this transformation within a wider framework of radical change, driven by the rapid pace of technological advancement and heightened by ongoing disruptions in global supply chains. He emphasized the strategic priority of achieving defence autonomy in Spain, underscoring the critical need for sustained collaboration between industry and the academic community. He also noted that the Spanish Navy is actively advancing the development of a secure combat cloud and identified electronic warfare and the cyber domain as key components of contemporary conflict scenarios.

Air General Braco reflected on the Air Force’s longstanding technological orientation, citing its leadership in implementing digital transformation initiatives. He referenced specific programmes such as Titan, which optimises resource allocation and air mission scheduling, and BACSI, a strategic project aimed at digitally interconnecting all systems within an air base. Both are designed to enhance efficiency and optimise the management of human and material assets.

All speakers agreed on the imperative of retaining the human element at the core of the decision-making process. They stressed that technological advancement must be accompanied by robust training in ethics and core values. It was noted that new technologies are generating growing interest among younger generations in the Armed Forces. Admiral Piñeiro cited the submarine simulators as both an educational tool and an innovative instrument for recruitment. Air General Braco reaffirmed the high levels of preparedness exhibited by the newest cohorts of officers and underscored the essential link between the Armed Forces, industry, and the university system.

In closing, the Chiefs of Staff reiterated that technological transformation extends beyond equipment and procedures. It also entails a significant evolution in organisational culture and personnel training. While the challenges presented are considerable, the opportunity to modernise and enhance defence capabilities is essential to ensuring the continued competitiveness and operational effectiveness of the Armed Forces within an increasingly demanding international landscape.

You can see this content here

<https://youtu.be/Cp6NIQ4SjZY?si=EGzRjVJeOkjJwLx4>



ITP AERO CONFERENCE ROOM (HALL 10)

Interview:

“Indra’s Vision for the Defence Industry”

Moderated by:

- **Mónica Carrillo**, Journalist

Speaker:

- **Mr José Vicente de los Mozos**, Chief Executive Officer of Indra

Following an overview of the current defence landscape by moderator and journalist Mónica Carrillo, José Vicente de los Mozos began his address by stating that the world is evolving rapidly. Within this dynamic context, he noted, Europe has become increasingly aware of the imperative to strengthen its strategic autonomy, not only in the area of defence, but across other critical sectors such as technology.

De los Mozos identified the figure of Donald Trump as a catalyst in accelerating this paradigm shift. At this edition of FEINDEF 25, technology clearly emerged as the central focus. Across the exhibition halls, the presence of cutting-edge innovations was evident. He affirmed that the defence industry is prepared to meet the demands of this new scenario, while also emphasising the need for stronger coordination and greater cohesion, both nationally and across Europe, in the execution of joint initiatives and collaborative projects.

In the field of innovation, Indra was highlighted as a key player, currently participating in 14 of the 19 principal European defence programmes. Following the war in Ukraine, De los Mozos focused his analysis on three key elements: the modernization of ground vehicles; the rise of drones and anti-drone systems, emphasizing how relatively inexpensive devices can neutralize much more costly systems; and the critical importance of secure communication, since technologies now exist that can disable communications.

In response to Mónica Carrillo's question about Indra's future mergers or acquisitions, De los Mozos indicated that the company has a clear economic ambition, based on two pillars: acquiring capabilities it does not currently possess and vertically integrating its value chain. He revealed that the company is currently assessing around 20 potential acquisition targets, each aligned with a clear strategic vision in terms of direction, product positioning, and partnerships. The overarching objective, he noted, is to strengthen the industrial base and to advance collectively by building new capabilities and reinforcing the entrepreneurial ecosystem.

In closing, he spoke of the transformative impact of disruptive technologies, such as artificial intelligence, digital twins, and cyber defence, stating unequivocally that these are here to stay. In this regard, one of his foremost strategic priorities is to position Indra among the top-tier technology companies in Europe.

To conclude his remarks, the CEO of Indra left a statement that encapsulated his ambition and vision: “Indra Group leads defence technology in our country.”



You can see this content here

<https://youtu.be/CE-7e5qSwH4?si=ru4QCfGxfKPokZoB>



ITP AERO CONFERENCE ROOM (HALL 10)

Presentation:

“European Defence Fund: New Funding Opportunities for the Defence Industry in 2025”

Speakers:

Mr Krastio Preslavsky, Deputy Head of Unit for Defence Industrial Programming Coordination in the Directorate-General for Defence Industry and Space of the European Commission (DG DEFIS)

Mr Francisco Casalduero, Programme Manager for Defence Systems Coordination in the Directorate-General for Defence Industry and Space of the European Commission (DG DEFIS)

The presentation delivered by Krastio Preslavsky and Francisco Casalduero offered a comprehensive overview of the European Defence Fund (EDF) and the funding opportunities available to the sector in 2025. Against the backdrop of ongoing international conflicts, both speakers underscored the urgent need to reinforce the European defence industrial base. They positioned the EDF as a strategic instrument designed to stimulate innovation and foster greater cooperation among EU Member States.

Krastio Preslavsky opened by contextualising the changes in the defence industry within the current geopolitical landscape, highlighting Spain's active role in European programmes and the significant participation of SMEs, universities, and technology centres. He also pointed out that the European Union is actively creating opportunities for new actors wishing to integrate into the continent's expanding defence and security ecosystem.

Francisco Casalduero explained how the EDF works, which has a budget of 8 billion euros for the period 2021-2027, divided into one third for research and two thirds for development. He clarified that the EDF does not fund procurement, but instead focuses exclusively on research and development initiatives. He also stressed the rigorous nature of the selection process, with over 200 projects expected to be approved by the end of 2025.

The submission deadline for new proposals is set for 16 October 2025. Casalduero addressed the eligibility criteria –limited to entities from EU countries and Norway– and the funding rates, which reach 100% in research and vary between 50% and 100% in development. He also noted that the calls cover a broad spectrum of thematic areas, including cybersecurity, space, health, and disruptive technologies, and that two funding models are available: based on actual costs or through work packages, the latter being particularly tailored to accommodate small-scale projects.

The session reinforced the European Defence Fund's pivotal role as a driver of technological advancement and strategic industrial growth across Europe. With a growing participation of SMEs - which increased from 35% to 47% in one year - and the upcoming implementation of the new European Defence Industry Programme (EDIP), the European Commission reaffirms its commitment to a stronger, more innovative and cohesive defence industry.



You can see this content here

https://youtu.be/eLWM03oFPJs?si=le03cl5eIWtaQ_tW



ITP AERO CONFERENCE ROOM (HALL 10)

UGT roundtable:

“Employment: Challenges and opportunities in the new investment cycle”

Moderator:

- **Mr Félix González Argüelles**, Administration and Resources Secretary of UGT FICA

Speakers:

- **Mr José Bayón**, Director General of EOI
- **Mr Raúl Presol Gonzalo**, Chief Human Resources Officer of Rheinmetall
- **Mr Justo Sierra Rey**, Chief Executive Officer and Chairman of UROVESA and Chairman of ASIME
- **Mr Juan Antonio Vázquez Real**, Industrial Policy Secretary of UGT FICA



During his address, José Bayón highlighted that the growth and consolidation of FEINDEF 25 reflect the dynamism and strategic momentum of the Spanish defence and security sector. He noted that one of the government’s principal challenges is to achieve the NATO objective of allocating 2% of GDP to defence investment. To reach this target, he underscored the need to prioritise education and the development of human capital. In this regard, he placed emphasis on the relevance of dual-use technologies, those with both civilian and military applications, and the important role played by the School of Industrial Organisation, which actively participates in European training initiatives. These programmes are aimed at equipping young professionals with the skills needed to contribute innovative, value-added solutions to the sector. He also introduced a new initiative to train executive-level professionals specialised in defence, with the goal of facilitating cross-sector knowledge transfer and preparing personnel to meet the evolving challenges facing the industry. He also emphasized the growing demand for skilled jobs within the sector.

Raúl Presol offered a reflection on the key moment the defence industry is going through thanks to the increase in investment. He pointed out that it is an industry with the capacity to structure the territory and generate quality employment, not only in large cities, but in autonomous communities throughout the country. Presol identified two priority areas for action: first, addressing the perception of the defence sector, which has historically been shaped by societal misconceptions; and second, the urgent need to develop a highly qualified and diverse workforce, from engineers and physicists to skilled production personnel, capable of responding to the industry’s real-world demands.

Justo Sierra focused his speech on the factors that will condition the growth of the defence industry in the coming years: the agile availability of facilities, the development of the supply chain –noting that for every direct job four indirect jobs are generated– and, especially, human talent. He stressed that both initial and continuous training are key to seizing the current opportunity and called for a concerted effort involving companies, associations, trade unions and public administrations.

Representing the trade union perspective, Juan Antonio Vázquez reaffirmed his organisation’s long-standing support for the sector, pointing to its strong economic impact and long-term sustainability. He welcomed the new wave of industrial employment being generated and emphasised the importance of aligning training programmes with the actual needs of the market. He also proposed the integration of early retirees from the armed forces into the defence industry workforce.

You can see this content here

<https://youtu.be/oLVQJP3oZCI?si=hQyAgY2yKryrQOdr>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Roundtable:

"AI in the Value Chain: Advanced Logistics and the Future of Military Sustainment"

Moderator:

- **Mr José María Navarro**, Editor-in-Chief of Tecnología e Industria de Defensa.com, Edefa Group

Speakers:

- **Brigadier General José Luis Rivera Pardo**, Director of Engineering, Army Logistics Support Command (MALE)
- **Commander Ramón Touza Gil**, Head of the Navy Intelligence Centre (CIA2)
- **Mr Raúl Lodos García**, Director of After-Sales and Integrated Logistics Support at UROVESA
- **Mr Jaime Rodríguez Lagunas**, Global Lead for Data and AI in Supply Chain and Operations at Accenture
- **Mr Christoph Meyer**, AI Expert and CTO of Thales Lab CortAIX

José Luis Rivera Pardo emphasised that maintaining technological superiority on the battlefield requires the Army to be equipped with next-generation systems that ensure mission readiness and operational advantage. To achieve this, he underlined the necessity of cutting-edge logistics capabilities that maximise availability and readiness. In this context, the Technological Experimental Logistics Brigade (BLET, standing for *Brigada Logística Experimental Tecnológica*) is set to play a key role in implementing artificial intelligence-driven solutions, particularly in vehicle fleets, by enabling real-time data monitoring and the anticipation of technical failures. This predictive and optimised maintenance capability will significantly enhance operational efficiency. Rivera highlighted the critical challenge of operating vehicles at great distances from their support centres, where predictive foresight enabled by AI is fundamental. Incorporating advanced technologies into the logistical chain, while ambitious, is essential to securing the Army's technological and tactical edge.

From a naval perspective, Ramón Touza Gil stated that logistics and sustainment form the backbone of maritime operational effectiveness. He identified artificial intelligence as the transformative lever that will allow current arsenals to evolve toward the concept of an "intelligent arsenal," with the logistics information system at its core. He outlined two principal challenges for this transformation: seamless integration with digital twin technologies and ensuring robust cybersecurity across platforms. He also stressed the need to combine corrective and predictive maintenance using intelligent warehousing systems. In this context, providing real-time, accurate logistical data to naval commanders is vital for operational decision-making. Touza recalled that the Navy has been actively developing monitoring capabilities for years to increase operational availability at sea.

Raúl Lodos García reinforced the added value that AI brings to the maintenance of military ground platforms. Operating within a business model that delivers short production runs to multiple clients, his organisation applies artificial intelligence to analyse logistics data, forecast equipment failures and adapt maintenance information into user-specific technical language.

He pointed out that AI-driven systems allow for dynamic stock definition and real-time predictive maintenance, thereby significantly enhancing the efficiency and effectiveness of support operations. He advocated for the promotion of talent across Europe and the development of artificial intelligence that is secure, trustworthy, and resilient to error.

Finally, Jaime Rodríguez Lagunas (Accenture) reflected on the imperative of supply chain resilience, particularly in the context of recent global disruptions such as the COVID-19 pandemic, the Suez Canal blockage, and the conflict in Ukraine. He emphasised that AI facilitates valuable applications such as predictive maintenance and inventory management, while stressing that success ultimately depends on data quality and effective collaboration between humans and machines.

You can see this content here

https://youtu.be/tn_CWJ1sEqU?si=HgHmHcUzN4niM2b-



MULTIVERSE CONFERENCE ROOM (HALL 8)

Roundtable:

“The Growth of Defence Investment: Challenges, Priorities and Strategic Returns”

Moderator:

- **Mr Miguel Ángel de la Cruz**, President of the Association of Defence Journalists

Speakers:

- **Mr Raymond Piselli**, Vice President of Corporate International Business Development at Lockheed Martin
- **Mr Álvaro Santodomingo**, Executive Director of the Defence Business Unit at ITP Aero
- **Mr Jorge Tamarit**, CEO of Eurofighter

In this panel on the defence industry, representatives from the public and private sectors analysed the challenges and opportunities to achieve effective re-industrialisation and greater technological sovereignty in Spain and Europe.

One of the central points was the need to create scale through strategic international investments that, although not directly linked to Spain, generate capabilities that can be transferred to the national environment. These initial operations serve as a lever to develop local industrial fabric and promote technological indigenisation.

All participants agreed that the key factor is speed: in government decision-making, in contracting processes, in program definition, and in project execution. Criticism was levelled at the slow Spanish and European bureaucracy, which hinders the launch of programs and delays entry into large international consortia, as happened on occasion with the Eurofighter. Unlike past contexts of peace, the current situation demands a much more agile and effective response.

Industry stakeholders, meanwhile, must be positioned to respond through proactive upstream investment in technology, ready-to-deploy industrial capabilities, and a highly skilled workforce. He stressed that Spain has a good talent base, but it needs to be expanded and adapted to new demands. Civil sectors, particularly aeronautics, were acknowledged for their counter-cyclical resilience and are now seen as valuable contributors to national defence capabilities.

Raymond, a representative from Lockheed Martin, stressed that it's not just about producing more planes or missiles, but about investing in human capital, training people, and transferring technological knowledge. Without these foundations, industrialization is not viable.

The panel also called for a reform of existing procurement models, noting that short-term contracts hinder strategic planning and resource optimisation. Multi-year agreements and long-term partnerships were strongly endorsed to ensure predictability and enable industry to secure key inputs. The importance of a national and European strategy that combines short-term and long-term projects was also emphasised.

Finally, investment in R&D was highlighted as an essential element for competitiveness, along with a stable budgetary framework that allows for the consolidation of innovative and sustainable industrial ecosystems.



You can see this content here

https://youtu.be/TqJ3hPCd7gE?si=YhX_BAYVC1u4CuZc

Inauguration of the Innova Space (Auditorium)

Speakers:

Lieutenant General Miguel Ivorra Ruiz, Director General of Strategy and Innovation in the Defence Industry (DIGEID)

- **Mr Manuel Cutrín**, CEO of ISDEFE



During the inauguration of the Innova Space at the FEINDEF 25 exhibition, the importance of moving towards a defence innovation ecosystem that involves all stakeholders in the sector was highlighted. Manuel Cutrín, CEO of ISDEFE, noted that this space should not be limited to serving as a technological showcase, but should function as a dynamic environment where new ideas and projects that contribute to the sector's development can emerge.

In turn, Lieutenant General Miguel Ivorra, Director General of DIGEID, stressed that the future of Spanish defence must be based on greater cooperation, increased innovation, and a more active role for Spain. He also emphasised the role of entrepreneurship as a fundamental tool for fostering innovation, noting that this approach is key to strengthening the country's security, autonomy, and competitiveness.

Presentation of Activities at the Innova Space

Speakers:

- **Mr Jesús Alonso**, Business Development Director of ISDEFE
- **Vice Admiral Fernando Suárez**, Deputy Director General of PLATIN

The programme and activities of the Innova Space were presented. This forum is dedicated to hosting conferences and events focused on innovation in the defence sector. The presentation was delivered by Mr Jesús Alonso, Business Development Director of ISDEFE, and Vice Admiral Fernando Suárez, Deputy Director General of PLATIN.

During the session, the speakers outlined the various projects and initiatives under development in this area, highlighting the Innovation Space's role as a meeting point for professionals and experts. They also emphasised its function as a platform for the exchange of knowledge, experiences, and best practices in the field of technological and business innovation in defence.



INNOVA AUDITORIUM (HALL 6)

INNOVA
FOR DEF & SEC

Panel:

"Barriers and Challenges to Defence Innovation"

Moderator:

- **Mr Luis Hernández**, Head of the Innovation Unit of the SDG PLATIN at the Ministry of Defence

Speakers:

- **Mr Jesús Ángel García**, Head of R&D and Universities at Indra
- **Mr Jesús Abraham**, Head of Defence Innovation at Telefónica
- **Mr Javier López San Román**, Head of European Affairs at Navantia
- **Mr Miguel Rego**, CEO of Funditec
- **Mr Guillermo González**, Head of Innovation and R&D at Isdefe

In the presentation entitled "Barriers and Challenges to Innovation in Defence," several industry leaders analysed the main challenges and opportunities for promoting innovation in the defence sector.

Miguel Rego (CEO of Funditec) highlighted collaboration as a fundamental strategic element and emphasised his organisation's role as a bridge between ideas and products, supporting start-ups in their development process. Jesús Abraham (Telefónica/Wayra) warned against structural complacency in traditional processes and advocated for the need for defence-adapted models based on dual-use technology.

Jesús Ángel García (Indra) emphasised that technology must anticipate needs, while Guillermo González (Isdefe) highlighted collaboration with the end user as the main challenge. In turn, Javier López San Román (Navantia) championed the integration of emerging technologies, including artificial intelligence, quantum computing, and biomaterials.

Among the common challenges identified were the need to update regulations, involve users from the outset of projects, overcome risk aversion, and promote experimentation as a driver of innovation. The debate was moderated by Luis Hernández of the Ministry of Defence.





Isdefe's 40th Anniversary - Video and Panel Discussion on Isdefe's Forty-Year History

Moderator:

- **Mr Carlos Molina**, Journalist specialising in cyberspace for El País/Cinco Días

Speakers:

- **Vice Admiral Francisco Javier Roca**, Commander of the Joint Cyberspace Command (MCCE)
- **Ms Angelines Turón**, Deputy Director General of Information and Communication Technologies at the Spanish Public Employment Service (SEPE)

As part of the Innovation Space event, Isdefe's 40th anniversary was celebrated with a roundtable moderated by journalist Carlos Molina (El País/Cinco Días).

During the session, Vice Admiral Roca, Commander of the Joint Cyberspace Command (MCCE), highlighted Isdefe's essential role in the development of the Joint Command, emphasising the knowledge, commitment, and dedication of its personnel.

In turn, Angelines Turón, Deputy Director General of ICT at SEPE, expressed her gratitude to Isdefe for its people-centred work and its ability to drive modernisation within the sector. Both were honoured with a special award presented by Manuel Cutrín and Jesús Alonso (Isdefe), in recognition of their career achievements and contributions to the institution's technological and organisational development.

During the event, it was emphasised that the main challenge today is the transformation of humanity brought about by cyberspace, which has changed the way we work, communicate, and address new challenges, such as the integration of artificial intelligence in the field of defence.

Challenge Launch by Monodon

Speaker:

- **Mr Iago González**, Head of Open Innovation at Monodon

During his presentation, Monodon's R&D department unveiled the Twilight Challenge project, a bio-inspired autonomous underwater vehicle designed to explore depths of up to 200 metres. Project leaders emphasised that the vehicle mimics marine animals through the use of soft tissues and flexible structures, enabling efficient and natural locomotion in the underwater environment.

They also noted that the vehicle is produced using additive manufacturing techniques, incorporates perception systems inspired by the senses of living beings, and employs optical communication to operate underwater with minimal energy consumption, thus maximising its autonomy. This approach combines technological innovation and biological principles to offer advanced solutions in underwater exploration and defence.





Roundtable:

“Defence on the Road to Innovation”

Moderator:

- **Mr Óscar Jiménez**, Head of the Planning Area and the R&D Control Programme at SDG PLATIN

Speaker:

- **Major General Jorge Corte-Real Andrade**, Military Deputy Director of DIANA
- **Mr Juan Antonio Tébar Chumillas**, Director of Innovation Policies at CDTI
- **Mr Juan Miguel Muñoz**, Rector's Delegate for Innovation at UPM
- **Ms Lucía Haro**, Technical Advisor to the Cabinet at INCIBE
- **Ms Paloma Almodóvar**, R&D Director at Zelestium
- **Mr César Ramos**, Director General of TEDAE

The panel “Defence: The Path to Innovation”, moderated by Óscar Jiménez (Ministry of Defence), discussed how to transform ideas into real products in the defence sector. During the session, the DIANA programme's approach was highlighted, which promotes collaboration between industry, government, academia, and capital, supporting both established and emerging technologies.

Lucía Haro (INCIBE) emphasised the role of the DIANA accelerator in strategic entrepreneurship, while J.M. Muñoz (UPM) addressed the importance of technology transfer from universities. Paloma Almodóvar (Zelestium) shared the case of her battery start-up, developed with the programme's support. Juan Antonio Tébar (CDTI) stressed the need to combine innovation with public-private investment, and César Ramos (TEDAE) advocated for combining traditional industry with new start-ups as key to achieving technological autonomy.

Among the common challenges identified were budgetary stability, political consensus, a defence culture, and attracting talent, all considered essential for consolidating a robust and sustainable innovation ecosystem.





Second day

ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“New Defence Landscape: Future Challenges”

Moderator:

- Mr Álvaro Santodomingo, Executive Director of Defence at ITP Aero

Speakers:

- Mr Carlos Alzola, CEO of ITP Aero
- Mr Miguel Ángel Morell of Indra

The second day of the FEINDEF 25 conference opened with a high-level round table moderated by Álvaro Santodomingo, Executive Director of Defence at ITP Aero, centred on the challenges and opportunities of the new defence investment cycle. In an international context marked by geopolitical tensions, hybrid threats and rapid technological transformation, speakers agreed on the need to strengthen technological sovereignty, industrial innovation and international cooperation as strategic pillars.

Carlos Alzola, CEO of ITP Aero, offered a historical lens, drawing a comparison with the defence landscape of the 1980s and 1990s: “It’s a story of growth. The existence of ITP was driven by a national requirement in air propulsion” He highlighted that today the company “is a global leader in complex hot structures and low-pressure turbines,” employing more than 6,000 professionals across four countries and contributing to all major European defence programmes.

Miguel Ángel Morell, representing Indra, reflected on the legacy of the previous investment cycle, which he said helped “create engineering within companies” and professionalise the sector. Now, he argued, the priority is “technological sovereignty and strategic autonomy,” asserting that developing proprietary products is essential for competing in international programmes: “It’s not enough to have the knowledge, you need to have the product.”

Both speakers identified budgetary stability, the reinforcement of the domestic supply chain, and the shortage of engineers as pressing challenges. To address the latter, Morell issued a direct appeal: “50% of the population are women, we need more women in engineering.”

On the future of air propulsion, Alzola noted that ITP Aero is currently undergoing “record years of investment in technology,” focused on three strategic lines: “developing more efficient products, new advanced materials, and exploring novel forms of propulsion.” He cited the ADMIRE centre, a €24 million investment in advanced manufacturing, as a flagship initiative: “We aim to achieve what until now seemed impossible.”

The round table closed on a unified note: “This new cycle is a historic opportunity to establish Spain as a leading player in the European defence industry,” provided it sustains a “strong commitment to innovation, domestic industrial development, and public-private collaboration.”

You can see this content here

https://youtu.be/AgdrPJt2u-l?si=zlsq_zPUbBZuDWOL



ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“Eurofighter: At the Forefront of European Strategic Sovereignty”

Speakers:

- **Mr Jose Gascó**, Head of External Communications for Defence at Airbus Defence and Space
- **Colonel. Francisco Javier Martín García-Almenta**, Head of Fixed-Wing Aircraft Systems at DGAM
- **Ms Yolanda Lara**, Director of the Eurofighter Programme at Airbus Spain
- **Mr Luis Alberto Marcos**, Director of the EJ200 Programme at ITP Aero
- **Mr Jorge Tamarit Degenhardt**, CEO of Eurofighter GmbH

The Eurofighter is increasingly recognised as a key capability in today’s European geopolitical and defence landscape. With close to one million flight hours, over 720 units ordered by nine nations, and the involvement of 400 companies and 100,000 professionals, it stands as one of Europe’s most significant examples of industrial and technological cooperation.

Its continued deployment in NATO missions and international operations reinforces its role as a strategic asset for deterrence and power projection.

During his remarks, Jorge Tamarit emphasised that the programme delivers not only advanced military capability, but also substantial industrial and strategic value for Europe: “Eurofighter is, has been, and will continue to be the largest defence cooperation programme in European history.” He noted that the programme is projected to contribute approximately €90 billion to European GDP by 2033, with an estimated fiscal return exceeding €22 billion.

Speaking on behalf of the Ministry of Defence, Colonel Francisco Javier Martín García-Almenta underlined that the Eurofighter remains “the backbone of our national defence,” highlighting its readiness for both domestic operations and international deployments. He also stressed the importance of ongoing technological development, particularly in sensors and electronic warfare, to ensure that “the weapon system remains operationally relevant.”

Yolanda Lara outlined advances in the programme’s industrial digitalisation: “Today, we can state that the industrial process on the Eurofighter assembly line is fully digital,” which improves efficiency and reduces costs. She also pointed to the integration of next-generation weaponry and the introduction of a new electronically scanned radar system from 2026, emphasising that this evolution calls for “a new model of collaboration with the armed forces.”

Luis Alberto, representing ITP Aero, recalled that the company was founded to meet the propulsion of the programme. They are currently developing a new nozzle designed to enhance engine performance and reduce its infrared signature. “A great idea is of little value if it cannot be manufactured or maintained,” he said, underscoring the need to align innovation with operational sustainability.

The session closed with a clear consensus: The Eurofighter not only meets the current operational requirements of European defence, but also lays the technological foundations needed to confront the future challenges of European combat aviation.

You can see this content here

<https://youtu.be/scHJ7osaUO8?si=WtPKkINjzR2I8UAJ>



ITP AERO CONFERENCE ROOM (HALL 10)

Presentation:

“NAVANTIA: Spearheading Innovation”

Speaker:

- Mr Ricardo Domínguez, President of Navantia



During the conference in the ITP Aero room, Ricardo Domínguez, president of Navantia, offered an overview of the trajectory, current state and future challenges of the Spanish public naval company. With over 300 years of history, Navantia has managed to evolve while maintaining its industrial spirit.

On the international front, Domínguez highlighted the company's operational footprint in Australia and Saudi Arabia, and pointed to the recent acquisition of four shipyard facilities in the United Kingdom. This operation, which he described as a "strategic milestone", not only strengthens local industrial capacity, but also positions Navantia as a global player in one of the most important naval markets.

Innovation formed a central theme of the address. Navantia allocated 10% of its annual budget to R&D&I, developing projects such as the Integrated Services System (SSI) and the Digital Twin, a 3D virtual replica that allows testing and optimizing operations without risks. It also presented monodon, an open innovation cell that drives disruptive technologies in coordination with the entrepreneurial ecosystem, and announced the launch of a Centre of Excellence aimed at maximising in-house talent and technological capabilities.

At the European level, Navantia leads NEREUS, a European Defence Fund project that brings together 24 entities from 14 countries to develop a common naval escort infrastructure integrated into multi-domain scenarios.

Domínguez concluded by highlighting Navantia's capacity as a driver of technological and industrial transformation, with an international vocation and commitment to European leadership, prepared to face the growing strategic role of the naval industry.

You can see this content here

<https://youtu.be/BYtath5o84w?si=Y1RuXh6dptw0bZ0K>



ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“Industry Challenges: Cooperation and Organisation to Address Sectoral Demands”

Moderated by:

- Ms Pilar de la Cuesta, Journalist specialising in defence at ABC

Speakers:

- Mr Pedro Alfaro, Director General of Zelenza
- Mr Manuel Escalante, CTO of Indra
- Ms Belén Feu Molina, CTO of EM&E Group
- Mr Enrique López, CEO of Amper Group

The round table, moderated by Pilar de la Cuesta, defence correspondent at ABC, brought together leading figures from the Spanish defence industry, who concurred that the sector is currently at a pivotal juncture. Rising investment levels, the imperative to reinforce technological sovereignty, the resilience of supply chains, and the attraction of skilled talent were identified as top strategic priorities.

Participants emphasised the need to enhance coordination between large enterprises and SMEs and called for stronger backing from the Ministry of Defence to facilitate SME integration into strategic programmes, particularly in areas of governance and sustainability. The innovative contribution of SMEs and the need for deeper cooperation were underscored as critical enablers in a context of mounting operational demands. Agility in responding to emerging threats and a sustained export drive were cited as key levers for the sector’s future growth.

Another focal point was the consolidation of industrial capabilities through acquisitions, strategic partnerships and consortia built around shared technological roadmaps. To this end, establishing clear governance frameworks, rooted in trust and adaptability, was deemed essential in navigating an evolving environment.

Publicly listed companies such as Amper and Indra were highlighted as pivotal in attracting investment and contributing to the structuring of the defence sector. Their capacity to integrate smaller firms while preserving agility and identity was seen as a core strength in building a more cohesive industrial ecosystem.

Overall, participants agreed that while the Spanish defence industry rests on a robust foundation, it requires greater structural articulation and defined corporate governance for collaborative projects. Looking ahead, the shared outlook was one of confidence in the sector’s trajectory towards greater autonomy, innovation, internationalisation, and cross-sector collaboration, positioning Spain to consolidate its role as a key player on the European and global stage.



You can see this content here

<https://youtu.be/UlxmnmobDw?si=t0gFpNOUfcm7JxVb>



ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“SMEs and Innovation in the Supply Chain”

Moderated by:

- Ms Carlota Sánchez-Cuenca, Secretary General of AESMIDE

Speakers:

- Brigadier General Vicente Torres Vázquez, Deputy Director General of Defence Industrial Strategy
- Mr. Jesús Abraham Fernández, Head of Defence Innovation at Telefónica
- Mr. Francisco Cortes, CEO and Founder of Sensia
- Mr José Rosell, CEO and Co-founder of S2 Group

The roundtable on the third day of FEINDEF focused on the crucial role of SMEs and innovation within the defence industry supply chain. It was emphasised that the large prime contractors, as pillars of strategic programmes, require a robust, agile, and innovative supply chain, where small and medium-sized enterprises play a fundamental role in ensuring the operability, success, and sustainability of the sector.

The discussion explored how effective collaboration between companies of varying sizes can be achieved, highlighting the need to cultivate environments that enable technology firms to grow and develop autonomously, while maintaining independence and stability. Innovation emerged as the primary driver of competitiveness, alongside public-private cooperation, which lies at the heart of AESMIDE's work, the association uniting all participating companies.

A significant challenge identified was talent loss. Participants agreed that Spain trains highly skilled professionals who are, however, not retained due to a shortage of attractive projects and competitive working conditions. This brain drain results in a loss of technological and industrial capacity, despite the country's potential to develop cutting-edge technology.

Finally, the Ministry of Defence's role was highlighted as a key link between industry and end users. Its responsibility extends beyond equipping the Armed Forces with suitable systems to actively supporting the industry's technological evolution. This reciprocal relationship is vital for the sustainable and competitive progress of the defence sector.



You can see this content here

https://youtu.be/RTnxE9kIaM?si=WR7beiHgb_c88wIK



ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“The Digital Strategy of the Ministry of Defence”

Moderator:

- Major Mr. Francisco Cuartero Lorenzo, Plans and Policies Area at CESTIC

Speakers:

- Lieutenant General Mr. José María Millán Martínez, Director General of CESTIC
- Colonel. Pablo Moreno Galdó, Deputy Director General of Plans and Information and Telecommunications Services at CESTIC
- Mr. Roberto López Gómez, Deputy Director General of Digital Transformation at CESTIC
- Major Gregorio Pulido Alonso, Head of Cybersecurity at CESTIC
- Major Rafael Roberto Delgado Carpenter, Head of the Executive Staff at CESTIC



At this roundtable, representatives from CESTIC outlined the entity’s essential role in driving the Ministry’s digital transformation amid a continuously evolving geopolitical and technological landscape. Emphasis was placed on its function as a central technological infrastructure, tasked with the efficient management, processing, and distribution of information within the defence sphere.

The speakers explained that CESTIC’s mission is to optimise the use of data and ICT systems to enhance both strategic decision-making and operational management. This, in turn, supports the efficiency of internal services and strengthens governance, key factors to ensure a defence posture adapted to the challenges of the new environment.

You can see this content here

<https://youtu.be/ID1bUA5L5kw?si=SCyhEkoLYHSfGNhJ>



ITP AERO CONFERENCE ROOM (HALL 10)

Interview:

“ **Autonomy: The Importance of Investing in Technological and Industrial Capabilities** ”

- **Mr Miguel Gómez**, Director General of Indie
- **Mr. Fernando Fernández**, CEO of EM&E Group

In recent years, EM&E Group has solidified its position as an attractive employer for young talent through its commitment to developing and controlling proprietary technology. This strategy, centred on innovation and technical challenge, has been crucial in attracting and retaining staff, especially in a context where internal training is a key investment.

The company has executed a planned territorial expansion, opening offices in strategic locations such as Alcalá de Henares, Córdoba, Huesca, Cádiz, Asturias, Valencia, and internationally, with a presence in Peru.

Upholding its commitment to the Armed Forces, EM&E continues to advance technological solutions tailored to the operational demands of today's environment. At the same exhibition, FEINDEF showcased the FEROX armoured vehicle, engineered to provide enhanced versatility and lightness, alongside the new aunav BEST modular robotic platform, which features artificial intelligence and is designed for operation in extreme environments.

With a vertical production model, EM&E contributes to strengthening national and European strategic autonomy by maintaining control over key technologies. In line with the goal to reach 2% of GDP investment in defence, the company underscores the importance of continuing to advance capabilities and technological readiness. Aligned with its philosophy, EM&E remains dedicated to constant evolution: “If you stand still, you become obsolete.”



You can see this content here

https://youtu.be/x003YB_aaKc?si=qpexfZJA6GgZJFqq

MULTIVERSE CONFERENCE ROOM (HALL 8)

Presentation:

“CompactifAI – AI Model Compressor and Its Application in Defence”

Moderator:

- Ms Iraia Ibarzábal, Cief Growth Officer of Multiverse Computing

Speakers:

- Dr. José Díaz Caro, Deputy Chief Technology Officer (CTO) of CESTIC
- Mr. Manuel Gallardo, Chief Business Transformation Officer of Oesía Group
- Mr. Alberto Reguera, Head of Aerospace & Defence at Multiverse Computing



This conference examined the role of artificial intelligence as a crucial tool for defence in a context where technological sovereignty is becoming increasingly strategic. Digital autonomy, system security, and infrastructure resilience are progressively reliant on advanced technologies such as AI.

The discussion emphasised the need to convert technological innovation into tangible operational capabilities, necessitating close collaboration among public institutions, national industry, and developers of disruptive technologies. Three experts, each representing one of these key areas, contributed to addressing this challenge.

A shared conclusion was the urgency to accelerate the adoption of AI within the defence sector. Key priorities identified include overcoming regulatory obstacles, robustly supporting domestic industry, increasing investment, and fostering environments conducive to technological experimentation. The overarching goal is to prevent a loss of competitiveness and reduce reliance on external capabilities amid a more demanding geopolitical landscape.

You can see this content here

<https://youtu.be/zbqqA-9dZ6c?si=qH9cQgj9n9HALwbg>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Roundtable:

“Investment as a Driver of Technological Innovation and Industrial Development”

Moderator:

- **Mr. Francisco Herranz**, Coordinator of Infodefensa.com

Presenting:

- Lieutenant General Miguel Ivorra**, Director General of Strategy and Innovation for the Defence Industry
- **Mr José Moisés Martín Carretero**, Director General of CDTI

Speakers:

- **Ms Beatriz Arribas Valiente**, Programme Director of UROVESA
- **Mr. Gabriel Coloma**, Business Development Director for the European Union and NATO at EM&E
- **Mr. Alfredo López**, Engineering Director, Defence Business Unit at ITP Aero
- **Ms Marta Nogueira Ramírez**, Regional Vice President for Spain within the Global Business Organisation of Airbus DS



In their introduction to this panel, Lieutenant General Miguel Ivorra and Mr José Moisés Martín, Director General of CDTI, emphasised the importance of transforming defence investment into an engine of technological innovation and industrial development. The defence industrial strategy unveiled in 2023 outlines an ambitious roadmap aimed at maximising technological returns, enhancing strategic autonomy, strengthening the industrial base and generating high-skilled employment.

Speakers stressed the importance of close coordination between the Ministry of Defence, the Ministry of Science and the CDTI to drive forward projects that contribute to a more secure, prosperous and cohesive Spain.

In the ensuing discussion, Beatriz Arribas highlighted the importance of a resilient domestic supply chain and national development as key to achieving industrial autonomy. Gabriel Coloma emphasised the need for sovereign manufacturing capabilities and deeper European cooperation to ensure technological progress. Alfredo López focused on the protection of national sovereignty through the identification and development of critical technologies, while Marta Nogueira pointed to the widening technological gap with the US and China, advocating for a strong European industry built on the dual foundations of national sovereignty and pan-European collaboration.

You can see this content here

https://youtu.be/rbbn6_0SYi0?si=FY4UHonpgri4e5t-

MULTIVERSE CONFERENCE ROOM (HALL 8)

Roundtable:

“Dual Technologies: Strategic Innovation and Public-Private Collaboration for a Competitive Ecosystem”

Moderated by:

- Ms Carlota Sánchez-Cuenca, Secretary General of AESMIDE

Speakers:

- Mr. Arnaud Bédu, Sales Accounts Partner for Solutions Sales de ACCURIS
- Ms María Luisa Díaz Menéndez, Head of the Planning and Strategy Department at INTA
- Ms Paula Martín Coba, Product Manager at TRC

The roundtable on dual-use technologies reaffirmed their significance for competitiveness and strategic autonomy. Speakers underscored the critical importance of close collaboration between the public, private and military sectors as a catalyst for innovation. This cooperation was recognised as essential to enabling access to advanced technologies, reinforcing supply chains and accelerating the development of effective and operationally relevant solutions. Participants also highlighted the value of proximity to the end user, the synergy between major contractors and SMEs, and the role of dual technologies in bridging the civil-military divide.

In closing, the panel emphasised that anticipation remains key to building sustainable and sovereign technological capabilities.



You can see this content here

<https://youtu.be/IJuiANRAtc4?si=QodIDSxzQOYe2hyl>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Roundtable:

“Cyber Defence in the New Strategic Environment: Protecting the Digital Domain in Times of Hybrid Warfare”

Moderated by:

- Mr. Ángel L. López Zaballos, Coordinator of the Cybersecurity Group at TEDAE

Speakers:

- LG Javier Roca Rivero, Commander of the Joint Cyberspace Command (MCCE)
- Mr. Sergio Gamo Velasco, Business Development and Innovation in Defence and Security at Telefónica
- Mr. Emilio Rico, Security Advisor at TRC
- Mr Igor Unanue, CTO of Thales



Cyber defence has become a core pillar of national security, responding to increasingly sophisticated threats in an environment where conflict extends beyond the physical domain into cyberspace, a space as invisible as it is potentially devastating.

Hybrid warfare, which merges conventional force with cyberattacks, disinformation campaigns and covert operations, aims to destabilise governments, institutions and societies from within. In this evolving battlespace, securing the digital domain demands cutting-edge technologies, enhanced operational resilience, and robust international cooperation.

Speakers agreed that cyber defence today represents not only a technical imperative but also a strategic and political challenge. They underscored the urgency of defending peace, freedom and security in a hybrid threat landscape. Particular concern was expressed regarding the impact of quantum computing on existing encryption systems, highlighting the need for rapid, forward-leaning responses. The panel also pointed to the disruptive potential of 5G in military contexts, and reaffirmed the strategic relevance of artificial intelligence and quantum technologies as essential enablers for digital defence. In parallel, they warned of the growing sophistication and automation of cyberattacks, which call for next-generation defence architectures and continuous vigilance.

In conclusion, cyber defence must be anticipatory, agile and fully integrated within national and international frameworks to ensure resilience and strategic security in an increasingly interconnected and exposed digital environment.

You can see this content here

<https://youtu.be/WeJhLIEfsAA?si=xVlatqItcUaGnEoC>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Roundtable:

“Cyberspace as an Operational Domain: Manoeuvre, Deterrence, and Digital Superiority”

Moderated by:

- **Ms María José Muñoz Estévez**, Head of Institutional Communication and Press at the Ministry of Defence

Speakers:

- **Major Enrique Pérez de Tena Martos**, Head of Institutional Relations at MCCE
- **Mr. David Conde**, Head of SOC & CERT at Thales
- **Mr. Carlos Díaz Hidalgo**, Cybersecurity Director at TRC
- **Mr. Sergio Gamo Velasco**, Director of Defence and Security Business Development at Telefónica
- **Mr. Jorge Uyá**, Managing Director at Accenture

Cyberspace has become an essential part of modern life and the fifth operational domain, alongside land, sea, air, space, and the cognitive domain. Despite its lack of physical boundaries, its impact is pervasive across critical sectors such as communications, commerce and security. In this environment, data assumes a strategic dimension; the ability to process it efficiently and convert it into actionable intelligence is essential, particularly in the defence arena.

Against a backdrop of persistent uncertainty and evolving threats, readiness and proactive defence remain critical imperatives. The Ministry of Defence continues to strengthen the Armed Forces' freedom of action in cyberspace, working in close coordination with industry partners, including those represented at this roundtable. These collaborations have fostered the development of advanced digital platforms and combat clouds, where artificial intelligence plays a decisive role in vulnerability detection and real-time operational monitoring. Secure communications systems, independent from public networks, are also being deployed to guarantee tactical superiority across all scenarios.

However, one of the most pressing challenges lies in the limited public awareness of cyber risks and the widespread undervaluation of personal data. Spain, with a strong pool of cyber talent, has a significant opportunity to consolidate a robust cyber defence posture built on cooperation between public institutions and private enterprise. In this domain, trust-based collaboration stands as a strategic enabler, underpinning the resilience and effectiveness of cyber defence capabilities.



You can see this content here

<https://youtu.be/dNZL9nj7e-l?si=3NmU4yb-Y9-FGP24/>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Guardia Civil Seminar:

“Strategy, International Cooperation, and the Capabilities of the Guardia Civil in Integrated Border Management”

Moderated by:

- LC Marcos Pérez-Mayor Rodríguez, Fiscal and Border Headquarters of the Civil Guard

Speakers:

- BG Joselito Minuto, Head of the Air-Naval Operational Command of the Guardia di Finanza
- Mr. Martin Ubelhor, Deputy Head of the Innovation and Security Research Unit (HOME F2) of the Directorate-General for Migration and Home Affairs (DG HOME)

The presentation offered a comprehensive insight into the Guardia Civil's role within today's complex global security landscape, emphasising its shift towards a more proactive and adaptive posture in addressing evolving threats.

International cooperation was identified as a strategic cornerstone, with active engagements involving Europol, Frontex, and police forces across Latin America and Africa, centred on intelligence exchange and the coordination of joint operations.

The intervention also spotlighted the Guardia Civil's participation in foreign missions, where it contributes to stabilisation efforts, security operations, and the local forces in international theatres.

In closing, the speaker underscored the imperative to respond to emerging forms of crime and hybrid threats, highlighting continuous training and institutional resilience as critical enablers in confronting both current and future challenges effectively.



You can see this content here

<https://youtu.be/ATPPjsgGduQ?si=UsPFXPYz9E0-rAiU>



Roundtable:

"The University–Industry Relationship in the Defence Sector"

Moderator:

- **Professor Félix Pérez**, Professor Emeritus School of Telecommunications Engineering, UPM

Speakers:

- **Mr. Jesús Ángel García**, Head of R&D and Universities at Indra
 - **Mr. Luis Enrique García**, Vice-Rector for Research at UC3M
 - **Mr Gabriel Molina**, CFM. Material Physics Center, CSIC
 - **Professor. Antonio Portilla**, Professor of Signal Theory and Communications, UAH
 - **Mr Jesús Abraham**, Head of Defence Innovation at Telefónica
 - **Mr Iago González**, Head of Open Innovation at Monodon
 - **Mr. Miguel Varga**, Materials Physics Centre, CSIC
-

At the Innova Space, the day began with a discussion on collaboration between industry and academia, highlighting the importance of maintaining sustained relationships, securing institutional support, and fostering the integration of young talent into the defence sector.

During the session, several challenges were also identified, including the lack of specific R&D infrastructure for defence and the disconnect between academia and the sector's real needs. Participants proposed improvements such as simplifying processes, promoting innovation, strengthening collaborative networks, fostering entrepreneurship, and aligning timelines with the actual pace of research, with the aim of optimising knowledge transfer and accelerating the development of new technological solutions.

NAVANTIA Conference:

"National and European Overview of Defence Startups: New Opportunities for Entrepreneurship"

Speakers:

- **Mr. Ricardo Domínguez**, President of NAVANTIA
 - **Ms Ana Moya**, Director of Engineering and Innovation at Navantia
 - **Ms Patricia Sierra**, Head of Monodon
-

Navantia highlighted its commitment to innovation through the growth of Monodon. During the event, key figures were shared: six centres of technological excellence, over 250 professionals involved in innovation projects, a network of 75 partners, over 100 ongoing projects, and the upcoming inauguration of 6,000 m² of new facilities.

The start-up landscape in the defence sector was also addressed, emphasising the importance of government support, the DARPA model as a benchmark for disruptive innovation, and Spain's potential in emerging technologies such as photonics and quantum computing. The session underscored the need to combine the experience of established industry with the agility of start-ups to boost the country's technological competitiveness.



INNOVA AUDITORIUM (HALL 6)

INNOVA
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TELEFÓNICA Conference:

“Innovation Hub for Defence. Talent Incubator”

- **Mr Jesús Abraham**, Head of Defence Innovation at Telefónica

The “Innovation Hub for Defence. Talent Incubator” presented a strategic vision to boost innovation in the sector, focused on creating a specialised hub that facilitates and accelerates technological development, especially from start-ups, spin-offs, and SMEs.

The proposed space should include a single communication channel, a technology sandbox, a secure environment for testing innovations under regulatory oversight, a multi-domain test site, legislation adapted to innovation, and an international collaboration network.

Its main objectives include attracting and retaining talent and innovation, supporting emerging technologies, promoting the relationship between defence and technology, and streamlining current processes to ensure innovation reaches the market and the sector more quickly. In a constantly changing environment, it was emphasised that adaptability will be key to the success of such initiatives.





INNOVA AUDITORIUM (HALL 6)

INNOVA
FOR DEF & SEC

INDRA Conference:

“Technology and Innovation in the Evolution and Disruption of Defence Systems”

- **Mr. José Miguel Pascual**, Director of Technological Observatories, Disruptive Technology Laboratories, and Electronics CoC

The conference on innovation in defence systems highlighted three key challenges: adaptability to new threats, European autonomy, and collaboration among strategic stakeholders. During the session, best practices were proposed, such as fostering early collaboration, establishing common standards, and accelerating the adoption of new technologies.

Indra presented its response to these challenges through the creation of open observatories, collaborative spaces, and innovation laboratories focused on advanced communications, quantum technologies, and optics. With these initiatives, the company reaffirmed its commitment to collaboration as a fundamental tool for driving innovation in the defence sector.



Start-up Elevator Pitch

At FEINDEF, start-ups took centre stage in the elevator pitch sessions, showcasing innovations ranging from specialised vehicles such as Little Cars, heatstroke prevention technology from Biodata Bank, Hyperloop transport from Zeleros, LEO satellites for defence from Fossa, to space connectivity solutions from Hydra Space. Also presented were advances in advanced photonics from Fyla Laser, emergency communication systems from Beagle Technology, radiation protection from Disit Biotech, haptic tactical training from OWO, drone systems from Red Team Shield, sounding rockets from Nerva Technologies, artificial intelligence for surveillance from Panssari, and decision-making tools with XAI from Skios.

The agile and dynamic format of the elevator pitches sparked great interest among attendees, who showed enthusiasm for discovering new ideas, projects, and prototypes with the potential to shape the future of technology applied to the defence and security sector.



Day 3

ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

“Female Talent: A Key Driver in the Growing Defence Sector”

MID PROJECT – (Women, Engineering and Defence)

Moderated by:

- **Ms Eva Cervera**, Director General of Edefa Group

Speakers:

- **Brigadier General Loreto Gutiérrez Hurtado**, Director of the National Security Department
- **Ms Elena Delgado**, National Business Development Director at EM&E Group
- **Ms María Jesús Llordén**, Manager of the Innovation and Services Centre (CIS) within the Defence and Security Technologies Directorate of Isdefe

A round table discussion, held under the auspices of the MID Project (Women, Engineering and Defence), served as a platform for highlighting the ongoing commitment to equality and professional excellence in the defence sector. It is an initiative, promoted by the Secretary of State for Defence in collaboration with the Royal Academy of Engineering, Isdefe, the Círculo de Tecnologías Foundation, and the Fundación FEINDEF. The session was opened with a reflection on the gender gap that persists from an early age across the STEM sector.

Currently, women represent less than 25% of personnel in the industry, and in the armed forces, the figure stands at just over 13%. While there is a positive trend, progress remains gradual and is not yet visible at senior levels.

The three leading women in defence who participated in the discussion shared their professional journeys, each shaped by early exposure to technical disciplines and strong family influences. From aeronautical engineering to high-level positions in the defence sector, they agreed that talent has no gender, although they highlighted that many girls are still unaware of their potential to choose technical careers. They asserted the importance of women in balanced teams, noting that diversity of approaches, leadership styles, and female empathy represent valuable assets in a sector undergoing transformation.

Regarding talent retention, they agreed that the challenge is not only gender-related, but structural, and focuses on sparking STEM vocations and creating a professional ecosystem that facilitates the development and retention of young talent, especially in areas of high technological demand.

During the session, the MID Awards were conferred as follows:

- Individual recognition was awarded to Ms Concepción Rodrigo Bayo, Captain of the Navy Corps of Engineers and Director of the Naval Weapons School, in recognition of her distinguished professional career.
- Institutional recognition was granted to Sainsel Sistemas Navales for its promotion of the MID Project's core values. The award was accepted by its President, Ms Susana Hernández Ruiz.
- Extraordinary recognition was bestowed upon Ms Sandra Gusi Martínez, a biologist specializing in microbiology and researcher in the molecular biology and immunology laboratories of the Department of NBC Defence Systems at INTA's La Marañosa campus.

The closing ceremony was led by Ms. María Amparo Valcarce García, Secretary of State for Defence, who thanked the MID project for its work and emphasized that, beyond investing in security, Spain must invest in talent, without neglecting half of its capacity: women.

You can see this content here

<https://youtu.be/E4WVj1Ns9UY?si=8N3SeKuCEucaPvFg>



ITP AERO CONFERENCE ROOM (HALL 10)

Roundtable:

"Disruptive Technologies for the Future"

Speakers:

- **Brigadier General Mr. Rafael Gómez Blanco**, Deputy Director of Fighter Aircraft and RPA Engineering at the Logistics Support Command of the Ministry of Defence
- **Mr. Miguel Ángel Frutos**, Technical Director and CTO of UAV Navigation at Oesía Group
- **Mr. Emilio Varela Sieira**, Corporate Director of Strategy and Corporate Development at Oesía Group
- **Mr. Santiago Simón**, Head of the Photonics Area and Unit at Oesía Group

The round table commenced with an address by Mr Emilio Varela, who outlined the strategic vision of the Oesía Group, centred on equipping Spain with genuine strategic autonomy. To this end, he explained, the company has optimised its technological capabilities, concentrating on areas of specialisation such as autonomous navigation and photonics. This strategic focus aims to deepen expertise in technological niches with high transformative potential.

Mr Miguel Ángel Frutos, CTO of UAV Navigation, underscored that disruptive technologies do not emerge spontaneously, but rather require robust and safeguarded ecosystems. He emphasised that innovation demands foresight, pre-investment, and access to real validation environments. He presented an artificial intelligence system capable of replacing human operators in autonomous systems, enabling the anticipation of adversarial action with agility and precision. He further highlighted the importance of integrating conventional knowledge with emerging technologies.

Mr Santiago Simón explained that photonics, understood as the science of light, constitutes a key enabler of Spain's technological autonomy. He noted that radio frequency photonics addresses the limitations of current systems and facilitates the development of entirely Spanish quantum communication solutions, featuring random key generation and advanced security protocols. Integrated photonics, he added, represents for light what microchips once did for electronics, enabling significant reductions in power consumption and size without compromising functionality.

Brigadier General Rafael Gómez Blanco concluded the session by focusing on the differential capabilities required by the Air Force, not only in terms of enabling technologies, but also in specific operational products. He noted that many of today's disruptive technologies are not new in concept, but that their current adaptation and application are what create strategic advantage. He expressed concern regarding the pace of innovation relative to other global actors and advocated for the development of more agile innovation ecosystems, supported by stronger connections between academia, research centres, industry, and operational end-users. "We must deliver differentiated products to our warriors," he concluded.

In closing, the session highlighted the increasing collaboration between industry, defence, and research as a natural and necessary response to contemporary threats. Nonetheless, key challenges remain, including talent retention and the urgent need for sustained investment. The consensus was unequivocal: the security of all must be a shared objective.

You can see this content here

https://youtu.be/G7gXk0Dxclc?si=z5kQX8BTt_mx9QAe



ITP AERO CONFERENCE ROOM (HALL 10)

Presentation by TEDAE:

“Social Perception of Defence and Security in Spain”

Speakers:

- **Mr Ricardo Martí Fluxá**, President of the Spanish Association of Defence, Security, Aeronautics and Space Technology Companies (TEDAE) and Vice President of Fundación Feindef
 - **Mr Narciso Michavila**, President of GAD3
-

The TEDAE Association presented a previously unpublished study on the social perception of defence and security in Spain. Mr Ricardo Martí Fluxá opened the session by framing the discussion within the current landscape of public and strategic debate, in which both Europe and Spain are confronted with escalating security challenges. He emphasised the importance of placing citizens "at the centre" of the discourse surrounding investment in defence. Against this backdrop, TEDAE commissioned GAD3 to conduct a nationwide survey to gain a clearer understanding of public opinion on this sector.

Mr Narciso Michavila, President of GAD3, presented the findings of a representative survey conducted with over 1,200 citizens aged 18 and above from across the country. He noted that we are witnessing the "end of an era" and entering a new phase characterised by hybrid and emerging threats. The survey revealed that Spaniards are increasingly conscious of global uncertainty. While concerns about pandemics and terrorism are declining, anxiety regarding armed conflict and systemic vulnerabilities is on the rise.

Among the key insights, the study found that 60% of the population supports the development of the national defence industry, with particularly strong backing among younger demographics. The results underscore that investment in defence is also perceived as investment in freedom, employment, innovation, technological sovereignty, and peace. Nevertheless, only 33% of respondents believe that Spain is currently prepared to meet the challenges it faces.

The study also identified a shift in societal priorities: while housing and unemployment remain the top concerns, defence and security have emerged as the country's third strategic axis. There is also a marked shift in public perception regarding defence spending: for the first time, more citizens consider the defence budget insufficient than excessive.

Among the most highly regarded institutions, the Armed Forces have gained significant recognition since 2022, now standing as the second most positively rated entity. By contrast, the private sector continues to carry some negative associations, although the public acknowledges its relevant role (6.6/10) and values its contribution to national industrial development.

On international cooperation, 80% of Spaniards view collaboration with NATO positively, though there is widespread opposition to participating in conflicts that lack a clearly defined interest or justified cause. It was also noted that 51% associate defence investment with a direct improvement in national security, while many also identify broader benefits such as the creation of skilled employment and the transfer of defence technologies to civilian applications.

The presentation highlighted that Spanish society is engaging with the defence debate with increasing maturity and shared purpose. With growing awareness of global challenges, investment in security is increasingly seen as a strategic imperative. Transparent communication and recognising citizens as stakeholders are essential to building a culture of democratic and collective commitment to defence.

You can see this content here

https://youtu.be/3_hr8cRuTJg?si=YIHYvmo2QME2p0YJ



MULTIVERSE CONFERENCE ROOM (HALL 8)

Guardia Civil Seminar:

"Innovative models in cybersecurity and against cybercrime"

Moderator:

- **Brigadier General Francisco José Almansa Aguilar**, Head of Digital Innovation at the Civil Guard

Speakers:

- **Lieutenant Colonel Alberto Rodao Martín**, Head of the Cybercrime Department of the UCO (DC3)
- **Mr. Otavio Margonari Russo**, Director of Cybercrime at the Federal Police of Brazil

The Guardia Civil organised this seminar with the objective of showcasing and comparing international operational models in the fight against cybercrime. Brigadier General Francisco José Almansa opened the session by underlining the growing relevance of this criminal phenomenon and introduced the two speakers, whose contributions offered a complementary and insightful perspective on the strategies being developed in Brazil and Spain.

Otavio Margonari Russo presented the recent structural transformation within the Brazilian Federal Police, implemented in 2023 in response to the new government's political commitment to intensify efforts against cyber and environmental crime. Since then, the Directorate for Combating Cybercrime – which he leads – has operated as an autonomous entity with its own organisational framework. This directorate addresses a range of criminal typologies, from child sexual exploitation and electronic fraud to hate crimes and complex high-tech attacks. Margonari shared compelling data that reflects the impact of the new structure: in 2024, 33.98% of all Federal Police operations were linked to cybercrime, with a 218% rise in operations and a 303% increase in indictments compared to 2022. He also noted a strong rise in specialist training, with a 122% increase in enrolment for technical courses and events.

Lieutenant Colonel Alberto Rodao outlined the Spanish model, which is integrated within the Judicial Police structure and the Guardia Civil's Intelligence Headquarters. He emphasised that unlike traditional forms of crime, cybercrime is defined by the volatility of digital evidence, which demands agile responses and highly adaptable structures. In Spain, efforts to combat cybercrime are organised around three primary areas: cyber-attacks, online child sexual abuse, and digital fraud. Rodao detailed the activities of specialised units operating on the dark web, and highlighted the importance of international collaboration and partnerships with the private sector, all coordinated closely with judges and prosecutors. He stressed the importance of reporting cyber incidents, as underreporting leaves many cases outside both statistical tracking and operational response.

Both speakers concurred that there is no universal model for success; rather, each country must tailor its strategy to its own level of capacity, centralisation, and specialisation. In conclusion, the session underscored the critical importance of public-private cooperation and international coordination in addressing an increasingly complex threat landscape.

As a gesture of recognition and institutional camaraderie, a symbolic tricorn was presented to the Brazilian Director on behalf of the Director General of the Guardia Civil.

You can see this content here

https://youtu.be/9gcSdfdtmpY?si=mvZHDOsd_JtSuBXx



MULTIVERSE CONFERENCE ROOM (HALL 8)

The National Intelligence Centre (CNI) Presentation: “Information Systems and Cybersecurity”

Speakers:

- Representative of the National Security Office (ONS)
 - Representative of the National Cryptologic Centre (CCN)
-

The session, organised by the National Intelligence Centre, addressed two complementary perspectives on the protection of classified information and cybersecurity in an increasingly demanding international context.

The National Security Office (ONS) delivered an in-depth presentation on the management of classified information in public procurement processes. It emphasised that confidentiality, availability and integrity must be guaranteed for such information. It was clarified that not all contracts involving access to classified information should be treated as “classified contracts” in their entirety, some may only contain annexes or specific clauses regulating those sensitive elements. The risks of both under-classification, which can jeopardise national security, and over-classification, which limits supplier participation and inflates costs, were also addressed. One of the cornerstones of the process is the classification guide, referred to as the “bible” of contractual security, as it defines what information is classified, for how long, and under what conditions. The need for security clearances, the communication of contracts to the competent authority, specific contractual clauses, and strict access control throughout the subcontracting chain were all highlighted as essential safeguards.

The presentation concluded with an analysis of international programmes involving multiple countries operating under different legal frameworks. In these cases, Programme Security Instructions (PSI) are employed to harmonise minimum security standards. In a context of rising defence expenditure and rapid digitalisation, it was noted that the number of contracts involving access to classified information is expected to increase significantly, placing greater demands on administrative resources and requiring improved efficiency.

The National Cryptologic Centre (CCN) addressed the emerging challenge posed by quantum computing to current cryptographic systems. An overview was given of quantum computing and its potential to undermine the public key algorithms currently in use across banking, government services and digital identity systems within the next 10–15 years. In response, the European Union has launched a transition strategy towards post-quantum cryptography (PQC). Spain is expected to have a national roadmap in place by 2026, with full migration to new cryptographic standards in critical systems by 2030, and in medium-risk systems by 2035. The principle of crypto-agility, designing systems capable of swiftly updating their cryptographic algorithms, was underscored as fundamental.

In conclusion, the speakers warned that the future of cryptography has already arrived. Being prepared is not a choice, but a necessity: failure to act leaves citizens exposed and the nation at a competitive disadvantage. Accelerating the modernisation of security systems is imperative, and both Europe and Spain have already taken important steps in this direction.

You can see this content here

<https://youtu.be/-MplTFGzjEQ?si=CzhQUQAKeiB5RNc6>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Round Table Universities – FEINDEF – CIRCLE FOUNDATION :

"A 360° View of the Spanish Defence Industry: Innovation, Dual Technologies, and Contribution to Strategic Autonomy"

Chaired by:

- **Ms María Guijarro**, Engineer and Vice President of the Defence Technologies Association

Speakers:

- **Major General Miguel Ángel Orduña Rodríguez**, Head of the Plans Division of the Air and Space Force Staff
- **Mr Jorge Quiroga Blanco**, Head of R&D&I at Navantia
- **Mr Gonzalo León**, Vice President of the Círculo Foundation and Professor at the Polytechnic University of Madrid
- **Ms Marina Martínez**, National Contact Point for Cluster 3 "Civil Security" Horizon Europe at CDTI
- **Mr José Miguel Pascual Ruiz**, Director of Hardware and Innovation Competence Centres at Indra

The roundtable offered a comprehensive overview of technological innovation in the defence sector. Major General Miguel Ángel Orduña opened the session by underscoring that military capabilities must serve both to deter and, if deterrence fails, to actively defend national interests. To achieve this, sustained investment in R&D&I is essential, particularly in a landscape where the private sector is increasingly leading on key technological advancements.

Gonzalo León stressed that there can be no strategic autonomy without technological sovereignty, an objective that depends on access to knowledge, the availability of skilled talent, secure supply chains and a robust regulatory environment. He emphasised that innovation must be agile and adaptable, and that international cooperation is indispensable, given the impracticality of absolute self-sufficiency.

From Navantia, Jorge Quiroga highlighted the value of a strong defence industrial base, capable of producing systems with high technological complexity. Reinforcing this industrial ecosystem, he noted, requires active collaboration, a culture of intellectual property, and effective strategies for talent attraction and retention.

Marina Martínez (CDTI) addressed the protection of critical infrastructure and the need to ensure the continuity of essential services, advocating for a holistic approach that bridges defence and broader society. She referenced the European "Preparedness Union Strategy" as a guiding framework to foster civil-military cooperation and build resilience against future crises.

José Miguel Pascual (Indra) asserted that achieving design authority is a fundamental step toward securing industrial sovereignty. Spain, he argued, possesses a mature industrial base which, with the right partners, is well positioned to consolidate its strategic autonomy.

The discussion also turned to dual-use technologies—those with both defence and civilian applications. Speakers agreed that defence can and should serve as a technological catalyst, enabling innovations that later transition to the civilian sector. However, they also pointed to the hidden costs associated with adapting these technologies, stressing the importance of reducing such barriers in order to remain globally competitive.

In conclusion, the session reinforced a shared message: only through sustained innovation, public-private collaboration, and a long-term industrial strategy can Spain and Europe achieve true strategic autonomy.

You can see this content here

<https://youtu.be/P2VqWpCiE8Y?si=IBX9pZJlhs-nAnB2>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Panel:

“Defending Us All: Engaging the Younger Generation in Europe’s Defence Sector”

Moderator:

- **Emilio Doménech**, CEO of Watif

Speakers:

- **Ms Irene Blázquez Navarro**, Director of the IE Centre for the Governance of Change (opening remarks)
- **Ms Alejandra Fernández**, Founder of Junior Female Leaders
- **Ms Elsa Arnaiz**, President and CEO of Talento para el Futuro (Talent for the Future)
- **Mr. Michele Testoni**, Associate Professor at IE University and author of the Next Generation Security report
- **Mr María Escribano**, Aeronautical Engineer at Airbus Defence and Space
- **Captain Santiago García Navarro**, NH90 Pilot with the Spanish Air and Space Force

The panel tackled a pressing issue for the future of European security: how to meaningfully engage younger generations in the shared defence endeavour. Irene Blázquez opened the session by emphasising that, amid rising geopolitical volatility and rapid technological change, it is crucial to integrate the generational perspective into the broader discussion on European defence.

Moderator Emilio Doménech set the tone with a reflection on the widespread lack of awareness among young people about the sector, referencing findings from the joint IE University and Airbus report, which revealed that 90% of young Europeans are unable to name a single company in the defence industry.

When asked what it means to “defend a society” today, panellists agreed that the definition has evolved: it now includes protecting democratic values, safeguarding cyberspace, ensuring the continuity of essential services, and upholding rights in a rapidly shifting environment. For Alejandra Fernández, this also entails identifying and empowering young talent, while María Escribano and Captain Santiago underlined the role of the Armed Forces in maintaining constant readiness for unforeseen challenges.

The discussion also explored generational misperceptions of the sector, concluding that the issue lies less in disinterest than in a lack of effective communication. Elsa Arnaiz noted that many young people are unsure how to access or engage with the field of defence, while Michele Testoni highlighted that Europe has operated in a “strategic vacuum” for decades, shielded by the US and NATO, leading to a diminished perception of external threats.

On the question of young people’s willingness to contribute to national defence, the panel acknowledged the concern that fewer than 35% feel adequately prepared, but viewed this figure as understandable. Importantly, they expressed confidence that youth would rise to the occasion when needed. Instances such as the Valencian floods in 2024 were cited as evidence that the desire to contribute exists, though structured preparation remains insufficient.

In conclusion, the panel agreed that the way forward is through honest, mature communication. Defence should be framed not solely as a military endeavour, but as a collective responsibility that spans security, technology, civic rights and societal wellbeing.

You can see this content here

<https://youtu.be/Ujz4Df0PBQM?si=QDiMbs4kXvLcpWoQ>



MULTIVERSE CONFERENCE ROOM (HALL 8)

Presentation:

“European Defence Fund: New Funding Opportunities for the Defence Industry in 2025”

Speakers:

- **Mr. Francisco Casaldueiro**, Programme Manager for Defence Systems Coordination at the Directorate-General for Defence Industry and Space (DG DEFIS) of the European Commission
- **Ms Nuria Mariñas**, European Commission (introduction)



The European Commission presented the latest opportunities under the European Defence Fund (EDF), which will channel €8 billion through 2027 to strengthen technological and industrial cooperation in the defence sector.

Francisco Casaldueiro, from the Directorate-General for Defence Industry and Space (DG DEFIS), clarified that the EDF supports research and development projects, excluding procurement, with a structure that combines full funding for research and progressive co-financing for development, depending on project maturity and Member State commitment.

The programme requires applications to be submitted by consortia composed of at least three entities from different Member States and actively promotes the involvement of SMEs, start-ups and research centres. This is facilitated through targeted calls, technical advisory tools such as free coaching, access to testing infrastructures, and matchmaking events. In 2024, SMEs accounted for 47% of applications and 38% of selected beneficiaries, receiving more than 25% of the overall funding envelope.

For 2025, nine competitive calls are already open with a submission deadline of 16 October, alongside two restricted-access calls. The topics span traditional domains (land, maritime, air, cyber and space) as well as emerging areas like disruptive technologies, biotech and digitalisation.

Casaldueiro also highlighted complementary instruments such as ASAP (Act in Support of Ammunition Production), EDIRPA (European Defence Industry Reinforcement through common Procurement Act), and the forthcoming EDIP (European Defence Industrial Programme), aimed at industrialisation, fostering multinational collaboration and enhancing supply chain resilience.

He concluded by encouraging companies to focus on the needs of the end user, make use of the programme’s technical support framework, and engage with their National Focal Points, essential contacts in each country to guide stakeholders through the process. He also underscored the importance of the European Defence Innovation Scheme (EUDIS), which seeks to attract talent, engage start-ups, and bring fresh actors into the European defence innovation ecosystem.

You can see this content here

<https://youtu.be/Wc4XhOtUWbo?si=bwhZ82ziNhTtwk6i>



Presentation PROMPATHON COPILOT Microsoft

Within the framework of FEINDEF 25, the PROMPATHON COPILOT challenge, spearheaded by Microsoft Spain in partnership with ISDEFE, was officially launched. The initiative proposes an innovative approach to tackling technological challenges in defence through the use of artificial intelligence tools.

This year, the focus was on drone management for military logistics, an area undergoing significant operational transformation. The use of solutions such as Copilot enables the exploration of new forms of digital assistance, automation, and efficiency in complex environments. The challenge presentation served as a starting point for participants to begin developing creative proposals, showcasing the potential of young talent and emerging technological capabilities applied to the defence sector.

Roundtable:

"Federated Test Ranges for the development of dual technologies. Fight while you develop, develop while you train"

Moderator:

- **Mr Jesús Abraham**, Head of Defence Innovation at Telefónica

Speakers:

- **Commander. Jaime Calvo** (MCCE)
- **Commander. Jesús Aparicio** (ET)
- **Commander Manuel García** (Navy)
- **Lieutenant Colonel. Vieira** (Air and Space Force)

The roundtable discussion, hosted by Telefónica within the Innova space, convened representatives from the three armed forces alongside experts in technological innovation to explore the potential of collaborative test environments. Framed around the concept of a federated Test Site, the discussion focused on the need to establish shared infrastructures that facilitate experimentation, training, and the concurrent development of dual-use technologies such as 5G.

Speakers emphasised the advantages of this model, highlighting cooperation between military branches and agencies as a driver of mutual learning, enhanced operational efficiency, and accelerated innovation.

The session also addressed key challenges, including inter-institutional coordination, the cultivation of specialised talent, and ensuring digital security, critical factors for positioning Spain as a technological leader within the NATO framework.



3.1.1.17. Media Coverage

The media presence of FEINDEF 25 exceeded expectations, cementing its position as a leading event at both a national and international level. The coverage generated over 3,500 news items, 242 of which originated from international media outlets, reflecting its growing global reach. In total, 507 journalists were accredited, including 124 international media representatives, ensuring broad and diverse coverage.

The media impact was particularly significant, with 32 television features, 39 radio features, 441 print articles, and a total of 2,339 online articles. Among the most prominent television broadcasters were Antena 3, TVE, Cuatro, Telecinco, La Sexta, Zoom Net RTVE, Telemadrid, Castilla y León TV, Castilla-La Mancha Media, Aragón TV, Televisió de Catalunya, Canal Sur, Radiotelevisión del Principado de Asturias, Canal Extremadura, and Televisión Región de Murcia.

These results highlight the main achievements of FEINDEF 25, with more than 500 accredited journalists from 192 media outlets, over 3,000 news items published, and a reach exceeding 700 million people. Overall, this edition has reinforced its position as the key event in the field of defence and security, consolidated its international reach, increased its recognition within Spanish society, and attracted new audiences, especially among younger demographics.

MEDIA TYPE	NUMBER OF ARTICLES	AUDIENCE
Press	441	29,411,648
Online	2,339	576,876,427
TV	33	12,358,600
Radio	39	1,469,000
International	242	83,989,158
Total	3,092	704,104,833

Overall, FEINDEF 25 has successfully consolidated its international profile, increased its recognition within Spanish society, and attracted new audiences, especially among younger demographics.



Outstanding Media Coverage – Television





In the radio sector, its presence was also notable, with broad representation from national and specialised stations, such as Cope, Cadena Ser, Onda Cero, RNE, Es Radio, Onda Madrid, Radio Intereconomía, Radio Voz, Catalunya Radio, Aragón Radio, Canal Sur Radio, and Capital Radio. Meanwhile, print media coverage was prominent in major newspapers and specialised publications, including El País, El Mundo, La Vanguardia, ABC, La Razón, El Economista, and Cinco Días, ensuring extensive and high-quality dissemination.

Prominent Media Coverage – Radio



The quantitative analysis of the coverage reflects the magnitude of the impact achieved. The 441 news items published in print reached an estimated audience of 29 million people, while the 2,339 online publications totalled more than 576 million impressions. The 32 television features reached 12.3 million viewers, and the 39 radio features reached over 1.4 million listeners. In total, more than 3,000 news items were recorded, reaching an estimated global audience of 704 million people.

Prominent Media Coverage – Press



LA RAZÓN

Madrid, capital de la industria armamentística

Madrid se ha convertido en el epicentro de la industria de defensa en España. La feria Feindorf 25, que se celebra en la ciudad, atrae a miles de visitantes y expertos del sector. El gobierno español apuesta por Madrid como plataforma de referencia para la cooperación internacional y la innovación tecnológica en el sector de defensa.

elEconomista.es

La imagen

INDEF 25 International Defence & Security Exhibition, Spain

ARRANCA LA GRAN FERIA DE DEFENSA. Los ministros Margarita Robles y Jordi Herrer, entre otras autoridades, inauguraron la vigesimosegunda edición de la Feria de Defensa y Seguridad en Roma. Un certamen fundamental para la industria por el Plan de Rearme de la UE y que cuenta con la asistencia de Israel por la guerra en Gaza.

elEconomista.es

LA TECNOLOGÍA 'MADE IN SPAIN' DE DEFENSA SACA MÚSCULO EN EUROPA

La industria española de defensa está ganando terreno en el mercado europeo gracias a su capacidad de innovación y desarrollo.

CincoDías

Feindorf cierra una edición histórica con 44.000 visitantes

La IV edición de la Feria Internacional de Defensa y Seguridad de España (Feindorf) concluye en Roma. Madrid consolida su posición como plataforma de referencia para la cooperación internacional y la innovación tecnológica en el sector de defensa.

LA RAZÓN

Madrid Feindorf celebra su edición más global

La Feria Internacional de Defensa y Seguridad de España (Feindorf) ha puesto en marcha su edición más internacional. Casi un tercio de los expositores procede de fuera del país, un récord para un evento que aspira a consolidarse como un referente en el sur de Europa.

elPeriódico

La industria de defensa toma Madrid

La feria Feindorf celebra la cuarta edición, la mayor de su historia, en plena exhibición por el aumento de la inversión en seguridad en España y el resto de la UE.

20 minutos

«La seguridad de Europa depende del final de la guerra de Ucrania»

El ministro de Defensa, Margarita Robles, ha afirmado que la seguridad de Europa depende del final de la guerra de Ucrania. La industria de defensa española está preparada para responder a las demandas de los aliados.

LA VERDAD

Los jefes de los tres ejércitos admiten que la fuga de talento debilita a las Fuerzas Armadas

«No vale engañarse. Con las condiciones salariales no podemos competir con la vida civil, admite el responsable de Tierra».

IDEAL

Una docena de empresas participan en la Feria Internacional de Defensa y Seguridad

Una decena de empresas españolas participan en la Feria Internacional de Defensa y Seguridad, mostrando sus últimas innovaciones tecnológicas y militares.

ABC de Andalucía

Casi 200 empresas andaluzas se exhiben en la Feria de Defensa

Casi 200 empresas andaluzas se exhiben en la Feria de Defensa, promoviendo la industria regional de defensa.



Its social media presence also showed remarkable growth compared to the previous edition. While 307 posts were recorded during FEINDEF 23, the latest edition reached 350, with an increase in followers from 1,444 to 3,808. Global reach grew from 298,493 accounts in 2023 to over 505,000 in 2025, while interactions increased from 7,035 to 12,174, reflecting a significant rise in engagement and interest from the digital community.

Social media	
FEINDEF 23	FEINDEF 25
307 posts	350 posts
1,444 new followers	3,808 new followers
298,493 accounts reached	505,089 accounts reached
7,035 interactions	12,174 interactions

SOCIAL MEDIA.	No. of PUBLICATIONS	TOTAL FOLLOWERS	NEW FOLLOWERS	VIEWS	INTERACTIONS
LinkedIn	26 (+53%)	9,744 (+32%)	2,362	121,580 (+494%)	9,390 (+745%)
Twitter	156 (+817%)	3,112 (+13%)	357	102,040 (+5,228%)	1,247 (+2,941%)
YouTube	50 (+2,400%)	515 (+10%)	46	54,239 (+533%)	4.4% (Percentage Total Interaction)
Instagram	118 (+686%)	2,314 (+82%)	1,043	227,230 (+3757%)	1,537 (+938%)



Regarding the official FEINDEF 25 website, the growth was even more remarkable. The 699,000 requests registered in 2023 grew to over 12.9 million in 2025, reflecting an exponential leap in digital activity. Similarly, unique visitors increased from 45,000 to 149,669, and the average visit duration rose by 22 seconds, confirming a higher level of user interest and engagement with the platform.

WEB	
FEINDEF 23	FEINDEF 25
699,000 number of requests*	12,968,859 number of requests*
45,000 unique visitors	149,669 unique visitors
2 min 58 seconds average visit duration	+22 seconds average visit duration
*Indicates the total number of actions users have performed on the website	

3.1.1.18. Looking to the Future

The next edition of FEINDEF presents an opportunity to consolidate the synergies generated throughout its history, strengthen its international reach, and enhance the spaces dedicated to promoting equal opportunities, innovation, and young talent.

The outlook is decidedly positive, with a focus on establishing the exhibition as a leading event for the sector, capable of responding to current challenges such as cybersecurity and hybrid threats, while maintaining a commitment to organisational excellence and continuous improvement. The goal is to continue acting as a driver of industrial and technological development, ensuring sustained growth and increasing the international relevance of the exhibition in its next edition, planned for 2027.





■ 3.2. Armed Forces Innovation Award

Among its activities, the Fundación Feindef promotes the Innovation in the Armed Forces Award, with the aim of recognising, showcasing, and fostering the creativity and talent of military and civilian personnel in research, development, and innovation projects related to defence and security.

In 2025, the Foundation actively participated in the XII National Congress on R&D in Defence and Security (DESEi+d 2025), which has become a leading forum for all stakeholders involved in R&D in the field of Defence and Security. This event provides a unique platform for presenting and disseminating the results of innovative projects, as well as for strengthening collaboration among institutions, industry, and researchers.

During this edition, the Foundation renewed its sponsorship of the Innovation in the Armed Forces Award, granted by the Subdirector General for Planning, Technology, and Innovation (SDG PLATIN) of the Ministry of Defence. This award recognises the most innovative initiatives developed by military and civilian personnel, contributing to the advancement of strategic solutions that strengthen the operational and technological capabilities of the Armed Forces.

The first prize was awarded to Lieutenant Francisco Javier Ruiz de Erenchun Jener for his project “UAV Launch System Integrated into the VEMPAR Logistics Platform: Design, Analysis, and Implementation,” which represents a significant advancement in the integration of unmanned technologies into military logistics operations.

The following finalist projects were also recognised:

- “Innovation in the Predictive Maintenance of Armed Forces Platforms through Autonomous Lubricant Analysis” – Lieutenant Colonel Carlos Jesús Vega Vera, Major Carlos López Pingarrón, and Professor José Santiago Torrecilla Velasco (Retired Second Lieutenant).
- “Container for Fire Simulation” – Corporal César Torres Arquelladas and Corporal Ángel Novoa Espasandín.
- “Recoilless Disruptor Cannon” – Lieutenant Commander Rafael Francisco Carreño Felices.

The Fundación Feindef’s participation in this congress and its involvement in awarding the prize reinforce its commitment to innovation in defence, promoting applied research, creative talent, and the continuous improvement of the Ministry of Defence’s technological capabilities.





■ 3.3. Women, Engineering and Defence (MID)

The Fundación Feindef aims to raise awareness about the importance of a gender perspective in international peace and security, as well as to highlight the relevance of gender equality in the defence and security industry and in institutions linked to these fields.

Within this framework, it promotes the “Women, Engineering, and Defence” (MID) project, designed to increase visibility and encourage women to pursue careers in the sector, especially in STEM fields. The project emphasises the professional opportunities offered by the defence and security industry, relying on female role models who inspire new generations.

Led by the State Secretariat for Defence in collaboration with four institutions (the Royal Academy of Engineering (RAING), ISDEFE (Systems Engineering for the Defence of Spain), the Circle of Technologies for Defence and Security Foundation, and Fundación Feindef), the MID project develops a series of activities, primarily in educational centres from secondary school through vocational and university levels, aimed at promoting, fostering, and raising the profile of female talent linked to engineering in the defence industry.

Objectives:

- **To encourage and consolidate women's** interest in the fields of Engineering and Defence.
- **To attract female talent** by providing role models in the sector.
- **To promote the training of women** in technical and technological fields as a path to equality.
- **To highlight the contribution of women** in the defence sector and in service to society.

Engineering Comes to Your School

Military and civilian engineers from the defence sector visit schools to share their career paths and professional and personal experiences with students in Years 10 and 11, encouraging them to choose the Science stream in Sixth Form.

To date, 17 schools have been visited, involving more than 1,565 students.

During 2025, the following schools were visited:

- IES Castilla, IES Gaya Nuño, IES San Leonardo, and Colegio Trilema in Soria. 28/03/2025. 300 students.
- IES Ágora in Alcobendas, Madrid. 10/04/2025. 25 students.
- IES Padre Isla and IES Giner de los Ríos in León. 26/11/2025. 200 students.

Women, Engineering, and Defence Dialogues





Presentations and discussions at universities where female military and civilian engineers from the defence sector meet with students in their final years of STEM degrees.

The goal is to encourage female students to choose the Armed Forces Engineering Corps or companies in the defence industry after completing their university studies.

To date, three universities have been visited, involving more than 300 students.

In this context, the Secretary of State for Defence, María Amparo Valcarce, met in April with María Guijarro Maortua, a doctoral candidate in Telecommunications at the Polytechnic University of Madrid. They discussed the need to increase the presence of women in the sector (currently around 18%) and reaffirmed the commitment to a more inclusive and innovative defence.



Women, Engineering, and Defence Breakfasts

Roundtables that bring together female engineers, professionals, and representatives from companies in the defence sector, open to the general public. Their objective is to encourage companies in the sector to increase their commitment to hiring women in STEM fields.

In 2025, the roundtable “Female Talent: A Key Driver in the Growing Defence Sector,” held on 14 May as part of the FEINDEF biennial exhibition, was a highlight.

Furthermore, to mark the International Day of Women and Girls in Science, the Fundación Feindef participated in the event organised by the ETSI Navales (School of Naval Engineering) of the UPM (Technical University of Madrid), in collaboration with RAING (Royal Academy of Naval Engineering), which focused on the role of women in naval engineering and defence.

The event, held on 11 February, included presentations and an intergenerational roundtable of female engineers, who shared experiences, achievements, and reflections on their professional careers, reinforcing the importance of diversity and female talent in strategic sectors.

The Fundación Feindef’s MID project consolidates a comprehensive action model that combines awareness-raising, training, and the promotion of female role models, contributing to strengthening the presence of women in the defence and security industry. These initiatives not only promote equal opportunities but also foster a more inclusive and innovative defence sector, aligned with the technological and social challenges of the 21st century.



4. Acknowledgements

The Fundación Feindef wishes to express its sincere gratitude to all the institutions, organisations, entities, and professionals who, with their support, commitment, and collaboration, have contributed to the development of its activities throughout 2025 and, in particular, to the success of the fourth edition of Spain's International Defence and Security Exhibition, FEINDEF 25.

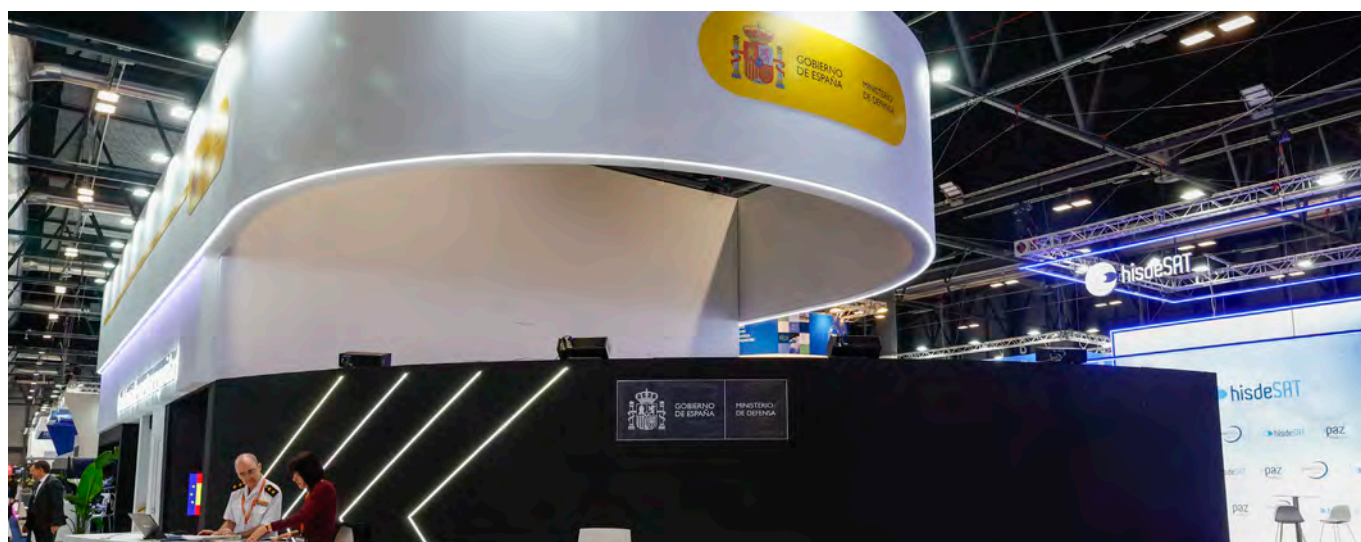
In particular, we acknowledge the ongoing work of its Board of Trustees, with special mention of its Founding Patrons: the Ministry of Defence and the industrial associations TEDAE and AESMIDE, whose commitment has been crucial since the inception of the Foundation. We also express our gratitude for the valuable contribution of the Ministry of Industry and Tourism, as well as the civilian and military authorities who, from their various positions, actively participate in the strategic development of the Foundation. In this context, we recognise the institutional leadership of the Ministry of Defence and the direct involvement of the Armed Forces.

This recognition extends to all those stakeholders who, from the institutional, operational, industrial, academic, technological, and media spheres, have contributed to the development of its initiatives and activities, fostering cooperation, knowledge exchange, the creation of synergies, and the international promotion of the defence and security ecosystem.

The Foundation particularly values the sponsorship and support for the Innovation in the Armed Forces Award, an initiative aimed at promoting talent, ingenuity, and an innovative culture among the military and civilian personnel of the Ministry of Defence, recognising technological and procedural solutions with the potential to directly contribute to improving operational effectiveness and strengthening defence capabilities.

Similarly, we highlight the collaboration of the institutions comprising the Women, Engineering and Defence (MID) initiative, led by the State Secretariat for Defence, in cooperation with the Royal Academy of Engineering (RAING), ISDEFE, the Circle of Technologies for Defence and Security Foundation, and the Fundación Feindef itself. Their participation has resulted in the development of actions aimed at promoting talent, equal opportunities, innovation, and technological dissemination.

The commitment, professionalism, and joint effort of all involved have been essential in strengthening the Fundación FEINDEF institutional position as a forum for meeting, cooperation, and value creation at the service of defence, security, innovation, and knowledge.





5. President of Fundación Feindef

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