East Netherlands: Strategic Hub for National Defense, Security and Resilience

Innovating and scaling up - a joint effort

This quick scan is offered to you on behalf of the business community in Overijssel and the province of Overijssel

provincie Overijssel · VMO Verenigde Maakindustrie Oost · koninklijke metaalunie · FME Powered by Dutch Technology · VNO NCW Midden · oost nl

East Netherlands: Strategic Hub for National Defense, Security and Resilience

Innovating and scaling up - a joint effort

Dear partner,

East Netherlands has a significant defense cluster with major international players, such as Thales and Rheinmetall. Additionally, countless other entrepreneurs are involved in designing, testing, manufacturing, and maintaining products and innovations related to defense and security. We have the skilled workforce, resources, and opportunities necessary to succeed.

Our region plays a vital role as an 'engine room' for the Netherlands, a region leading in (photonic) microchips, cybersecurity, large intelligent drones, and radar technology. You can find more information about this in the following pages.

Various studies make it clear that there is also a great need for this from companies and educational institutions in East Netherlands. Overijssel already has an extensive defense cluster with major, often international, players. But countless other entrepreneurs are also ready to get to work designing, testing, making and maintaining products and innovations in the field of defense and security. We have the people, the resources and the opportunities.

I want to invite you right now to explore the possibilities with our companies and educational institutions. As far as I am concerned, we are building an integrated and fast-twitching business and education network, covering all facets of what our society needs in terms of security, working together on national and European defense and security efforts.

Sincerely,
Erwin Hoogland

Vice Governor for the Province of Overijssel

June 12, 2025

Offer

Manufacturing, innovation and service & training

Industrial companies in the eastern Netherlands are accustomed to responding quickly and flexibly to changing demands and circumstances from organisations such as the Ministry of Defense.
In short, the East Netherlands region is characterised by:

- ...a relatively strong presence of the Defense and security industry.
  - with more than ***220*** already active within the Defense market and already collaborating extensively with knowledge institutions and others;
  - with great scale-up potential among dual-use and civilian companies that can and want to supply the Defense market.
- ...strong cooperation among companies, and with educational and knowledge institutions.
- ...leverage provincial investment funds and a province-wide network of organizations.
- ...relevant (Defense) infrastructure and presence of barracks and training grounds.
- ...(geographically) strategically important region in Northwest Europe as a 'rest overnight'.
- ...availability of an (inter)national excellent MedTech profile.
- ...even more opportunities for industry (partners) to contribute to the rapid development of new Defense capabilities in all domains: land, air, water, space and cyber.
- **...last, but not least:** expertise in innovation, production, maintenance, education and training. These are summarized in 3 distinctive propositions: ***manufacturing, innovation and service & training.***

Proposition 1: MANUFACTURING	Proposition 2: INNOVATION	Proposition 3: SERVICE & TRAINING
Strengthen the supply chain and ecosystems of existing companies, which supply Defense.	Invest in innovation and technology development in the areas of UAVs, drones, autonomous systems, advanced materials & manufacturing processes, quantum technology and cybersecurity.	Post-production services and optimal use of existing infrastructure (maintenance, training, testing, storage and practice facilities).

Strong in Manufacturing (scaling up)

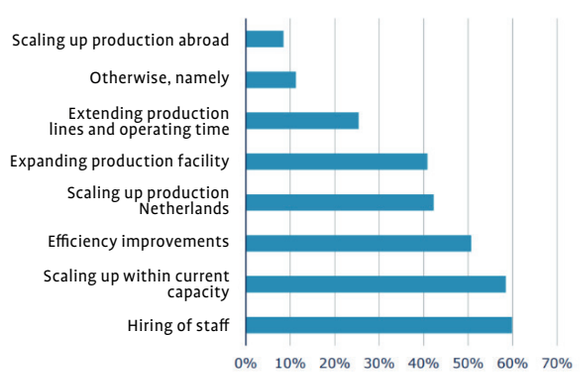
Explanation of proposition 1

- The manufacturing focus in East Netherlands is mainly on robotics, autonomous systems, 3D printing, new materials , RF technology, chips and sensing.
- Innovation and production on chip technology, radar systems, RF technology go hand in hand.
- Dual use and civilian supply companies in East Netherlands see opportunities for ***scaling up*** their production capacity for Defense (doubling is possible!).
- Research by Berenschot[1] shows that all companies already supplying Defense see opportunities to ***scale up***.
- There is much upscaling capacity to be gained from civilian and dual-use companies: more than 1/3 of the requested companies expect to have or be able to develop value-added offerings for Defense and Defense suppliers.
- Existing economic programs[2] - in the areas of smart manufacturing, battery development and chips - help increase business productivity and scale up (more flexibly). Manufacturing security is a joint effort.
- The number of Defense supply suppliers could increase significantly in East Netherlands. This is in line with Defense's desire to be able to quickly scale up production capacity. Existing Defense suppliers also see plenty of opportunities to ***scale up***. This concerns both ***high-tech and low-tech*** production capacity as well as service & maintenance of equipment.

Interesting

- **44 companies** with products/services of potential value.
- **24 companies** whose products/services with modification are appropriate.
- Relatively **many companies** active in **DIS-areas** (*platforms, platform protection, weapons systems and ammunition, among others*).

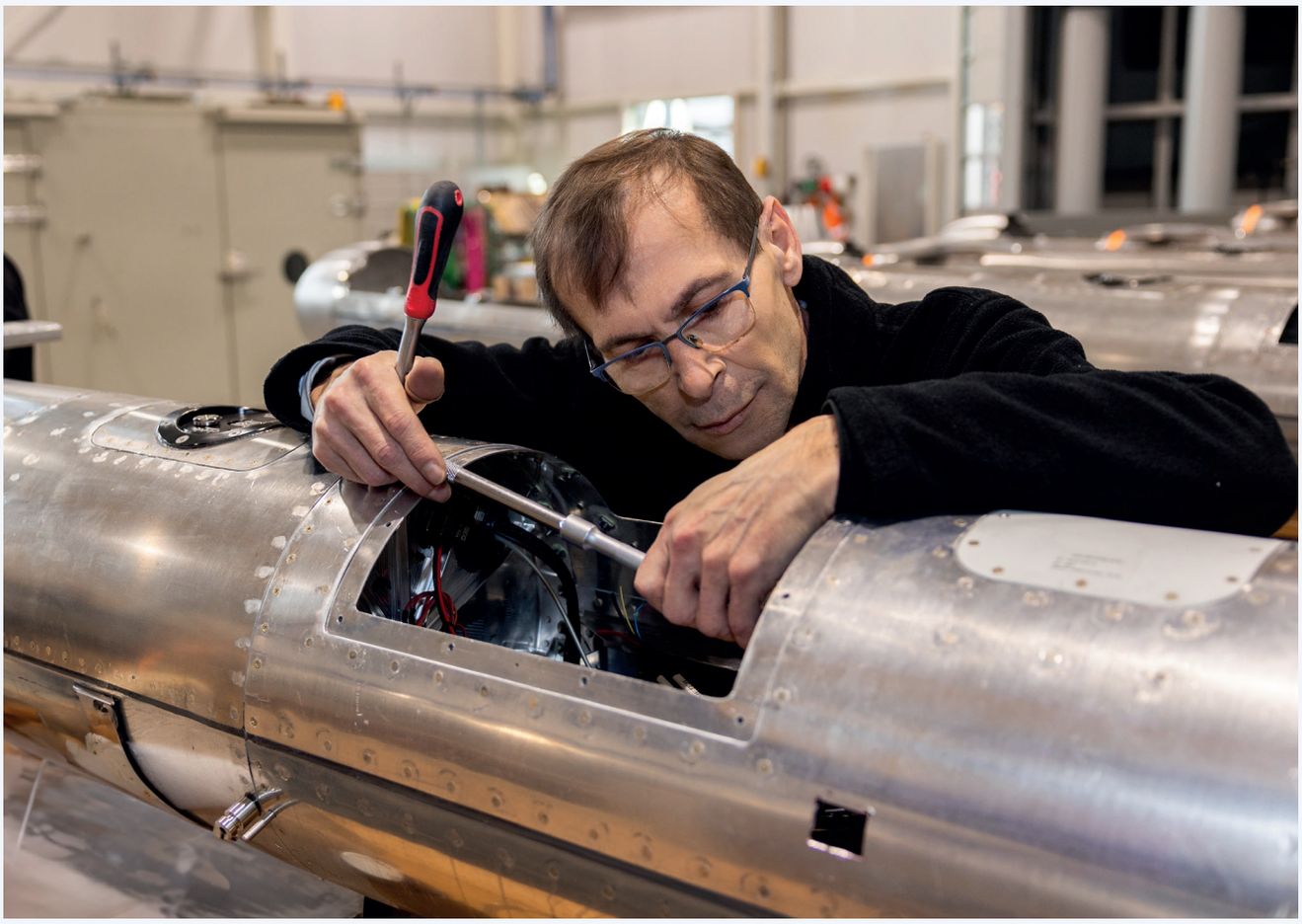
How companies expect to scale up



Source: Berenschot research

[1] *Research Berenschot February 2025*

[2] *Such as EDIH, Boost actieprogramma, ChipTech, NextGenHighTech and Battery Competence Cluster*



Strong in Innovation

Explanation of proposition 2

- Companies and knowledge institutions in East Netherlands are very strong in innovations in (photonic) chips, RF technology, cyber security, sensing (radar, medical imaging, microflown), smart materials and unmanned systems.
- Integration of improved assembly and manufacturing solutions is accelerating innovative capabilities.
- Innovative capabilities go beyond a single-use product or service: Army operations require intelligence for data processing, communications, command and control and interoperability.
- Several companies and knowledge institutions in East Netherlands are working together on the innovative development and production of intelligent unmanned systems.

Interesting

- **19 companies** indicate valuable products/services to develop.
- Companies especially **active in DIS-areas** (*robotics and autonomous systems, 3D printing and new materials*).
- Wihtin **robotics** en **autonomous systems,** relatively, there are many companies that can develop new products and services for the defense market.

Strong in Service & Training

Explanation of proposition 3

Service (including equipment maintenance) and education & training are preconditions for the propulsion capability of Defense. In East Netherlands companies and knowledge institutions facilitate these preconditions. More optimal use should be made of these.

> East Netherlands has a tightly branched and collaborative ecosystem of research, development and education in technology for the full breadth: from science to practice.

> The business community works closely with educational institutions: several MBO programs (about 100,000 students) and 3 universities and 3 colleges (about 140,000 students) train multi-skilled talents for future challenges in the transition to a digital and circular economy.

> East Netherlands utilizes existing training networks, such as WIMM of Wadinko.

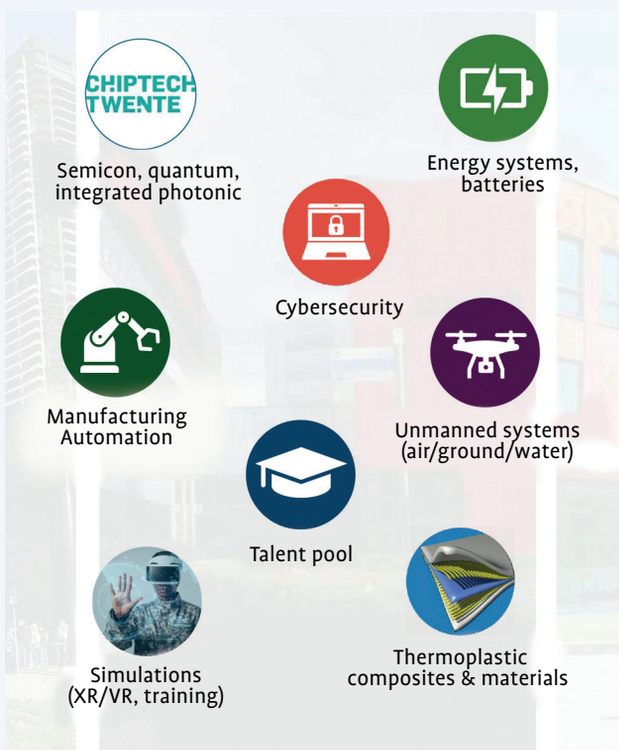
> East Netherlands is home to many Army bases. Education and training of all four operational commands take place in the municipality of Apeldoorn.

> Overijssel serves as a pilot for the regional interpretation of a resilient society and military preparedness, together with educational institutions, other reserves and security regions.

> Realisation of a state-of-the-art instrument landing system at Airport Twente.

Interesting

> **Relatively many companies are active in DIS-areas** *(repair and maintenance of equipment and materials, and logistical support).*
> There are **opportunities** for **additional offerings** for the Defense market in the form of services such as IT, repairs, training and logistics & transportation.



Production + Innovation + Service & Training

Explanation supply Overijssel in East Netherlands

In order to properly embed the propositions of production and innovation, service and training, the establishment of a DARPA-type organisation in the East is desirable. The purpose of a DARPA in this context would be to ***scale up production*** and develop ***new technologies for military applications*** (often involving innovations that later find ***civilian applications***), and to facilitate service and training.

Through good cooperation with knowledge institutions, companies and government agencies, there is also access to ***top talent and research***, and thus Defense can maintain its technological edge and stay ahead of future threats.

The integrated system becomes special because companies are able to ***rapidly scale up production*** and there is opportunity for ***rapid, high-risk innovation without bureaucratic delays***. Due to short project cycles, high risk and focus on national security, the Overijssel ecosystem previously developed groundbreaking radar technology, cargo drones and combat clothing.

DARPA for East Netherlands

Research › ***Funding*** › ***Development*** › ***Prototyping*** › ***Implementation***

In East Netherlands, the elements for putting together a DARPA are up for grabs, including, for example, within:

Proposition 1: Production

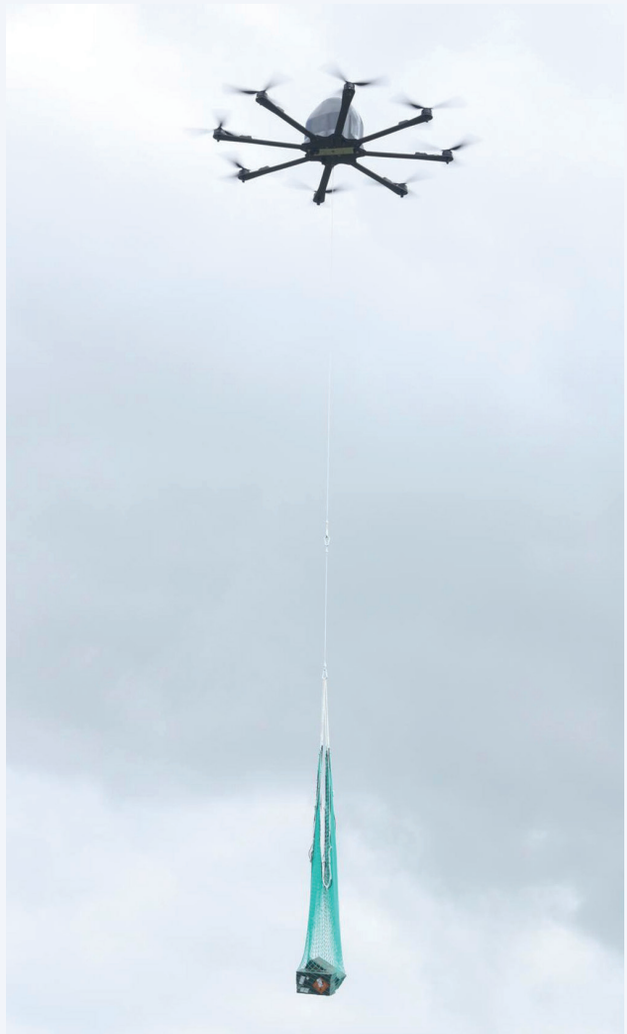
- Military-Civilian investment in a dual-use drone factory for assembly and (systems) integration;
- Heavy-lift drones capable of lifting heavy loads over 70 kg such as agricultural applications or mobile cranes;
- Establishment of a photonic chip factory;
- Prototyping 'mobile laser comms' at Technology Base;
- Corporate apparel and defense textile recycling (circular).

Proposition 2: Innovation

- Strengthen position of national radar industry;
- Cooperation in innovation, production, education and knowledge on one campus;
- Remote controlled systems, such as cargo drones, unmanned systems and counter drones;
- Unique medical cluster including remote support applications;
- Advanced 'Textile Industry for Specialties' for uniforms with biometric applications, for example;
- High Tech Materials: from lightweight applications to coatings for ships;
- Unique knowledge and development on photonic chips and RF technology;
- Compact, portable generator for special forces and others;
- Energy and cooling systems architecture and solutions for high energy needs, mainly direct energy systems;
- Development of autonomous systems, artificial intelligence and synthetic data to combat unmanned ground systems;
- Autonomous unmanned aerial vehicles;
- Development and industrialization of free-space optical communications.

Proposition 3: Service

- Establish cargo drone test and development center (Airport Twente);
- Build out (cyber) security operations center in combination with Security Center Apeldoorn;
- Overijssel as pilot for regional implementation of resilient society and military preparedness, along with educational institutions, other reserves and security regions.



Collaborate

The key to success

Successful collaboration starts with understanding each other well. How can we ensure that?

- Scaling up the Defense Industry is a joint effort of Defense, industry, education, knowledge institutions and provinces;
- Orders, orders, orders...;
- Force multiplier of Defense commitment and commitment of Ministry of Economic Affairs on industrial participation;
- Innovative forms of collaboration at the level of ecosystem elements such as dual-use production facilities, open innovation, talent and internationalization;
- Increased clout by joining forces on a venture development program for dual-use and civilian supplying SMEs;
- Elements assistance with networking within the Defense Domain, assistance with experiments, networking within Europe, assistance with ABDO rules, funding resources, investment in dual use production facilities and trade mission support;
- Command and control between the deployment of Defense and the deployment of civilian resources from East Netherlands leads to increased propulsion capability at the national level;
- In the European context, East Netherlands works within the EURADA network and participates in the European network DG Defense Industry & Space. In addition, East Netherlands cooperates in existing programs with Germany, the Baltic States, Poland and Ukraine.

This quick scan is based on a study by Berenschot in East Netherlands and is presented to you by the Province of Overijssel on behalf of business and knowledge from Overijssel and Oost NL.

The photographs in this document have been provided with the consent of the respective companies.

Translated using Deepl.com

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