

MONTHLY EXECUTIVE BRIEFING

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The EU moves to secure its research

The proposed European Research Area (ERA) Act is intended to give research security a firmer and more consistent basis in European Union law. Its success will depend on reforms by member states, which have repeatedly fallen short of shared research goals, including the two-decade failure by the majority to meet the 3% of GDP target for research and development (R&D).

- The European Commission is expected to present its ERA Act proposal in the third quarter of 2026. Adoption before the current mandate ends is the goal, but the timeline is not guaranteed.
- The ERA Act is expected to include new legal mechanisms to support all member states to achieve the 3% of GDP R&D target.
- The new act aims to align investments, research-security policy and industrial policy across member states, businesses and universities to enable a pooling of resources to increase European competitiveness in technology development.
- The ERA Act will set the standards for secure collaboration, but success will depend on implementation, which is the responsibility of member states. While the act is likely to make Europe's research secure, on its own it will not make it more competitive.

GSIS 2026 News

The GSIS 2026 conference programme is taking further shape:

- **More speakers confirmed:** Dr Sofie Lindskov Hansen, Chief Quantum Expert, Ministry of Foreign Affairs, Denmark, and Gerald Mullally, Chief Executive Officer, Oxford Quantum Circuits, will join the plenary session **"The Innovation Frontier: Quantum and the Future of Security"**. Laurent Jaffart, Director of Resilience, Navigation and Connectivity at the European Space Agency (ESA), will take part in **"Securing the Orbital Economy"**.

- Additional high-level speakers from government, defence, industry and technology will be announced over the coming weeks via the official [GSIS LinkedIn channel](#).

- The conference agenda has been updated: All latest sessions and changes can be found on the [GSIS website](#).

- The GSIS [Startup Hub](#) opens up new opportunities for emerging companies to showcase their solutions and connect with investors, industry leaders and decision-makers from across the security ecosystem.

€403 BILLION

TOTAL EU R&D SPENDING IN 2024

€93.5 BILLION

HORIZON EUROPE FUNDING FOR 2021–27

TWO MILLION

RESEARCHERS LIVE IN THE EU



The strategy

The EU is attempting to construct a comprehensive research-security framework. The European Commission is expected to propose the ERA Act in opening negotiations with the European Parliament and Council of Ministers in the third quarter of 2026. It is expected to contain a common methodology for resilience testing of research organisations; an R&D commitment to 3% of GDP by all member states; stronger coordination of research and innovation policies and investments; measures to facilitate cross-border mobility for researchers; and protections for core European research values, including academic freedom. Concurrently, a European Centre of Expertise on Research Security will launch to support researchers in assessing risks; for example, by creating a due-diligence platform for researchers choosing international partners.

These changes form part of a wider effort to strengthen Europe's technological resilience. The proposed revision of the Cybersecurity Act would allow the EU to designate and restrict high-risk suppliers, while the Chips Act 2.0 and the Cloud and AI Development Act aim to strengthen European capabilities in semiconductors, cloud and artificial intelligence. Together, these initiatives suggest a coherent policy direction. The ERA Act's resilience-testing methodology and the new European Centre of Expertise should also give member states a common set of tools. The harder question is delivery. The act relies on coordination more than compulsion and its stronger provisions may be diluted in council, leaving a framework that is strongest where agreement is easiest and weakest where it matters most, such as mandating financial commitments, defining dual-use research, and closing the national security loopholes that hostile actors currently exploit.

To preserve the intrinsic values of science, the EU aims to achieve 'secure openness', defined as being 'as open as possible, as closed as necessary'. However, a significant share of European research and innovation takes place in the private sector, where businesses have a strong commercial interest in protecting their proprietary technologies. Because insufficient cooperation between academia and businesses currently prevents the EU from pooling resources and talent in strategic sectors, a critical, yet often overlooked, part of this fundamental challenge is ensuring that academics maintain a level of research security that businesses can trust.

"We must invest in critical technologies also to ensure Europe's strategic autonomy – whether it's drones, cyber defence or quantum technologies."

Ekatarina Zaharieva, European Commissioner for Startups, Research and Innovation, 17 June 2026



Europe's dilemma

The task has become more complicated because the key technologies of the future are increasingly dual-use and are highly integrable. Information technologies can be combined to enhance existing and generate new capabilities. While the civilian application of dual-use technology enables commercial investment to accelerate its development for potential European military use, it also poses questions about the importance of safeguarding their development from foreign interference. The joint assessment of risks associated with critical technologies, initiated under the European Economic Security Strategy, is crucial to striking a balance between safeguarding research and supporting innovation.

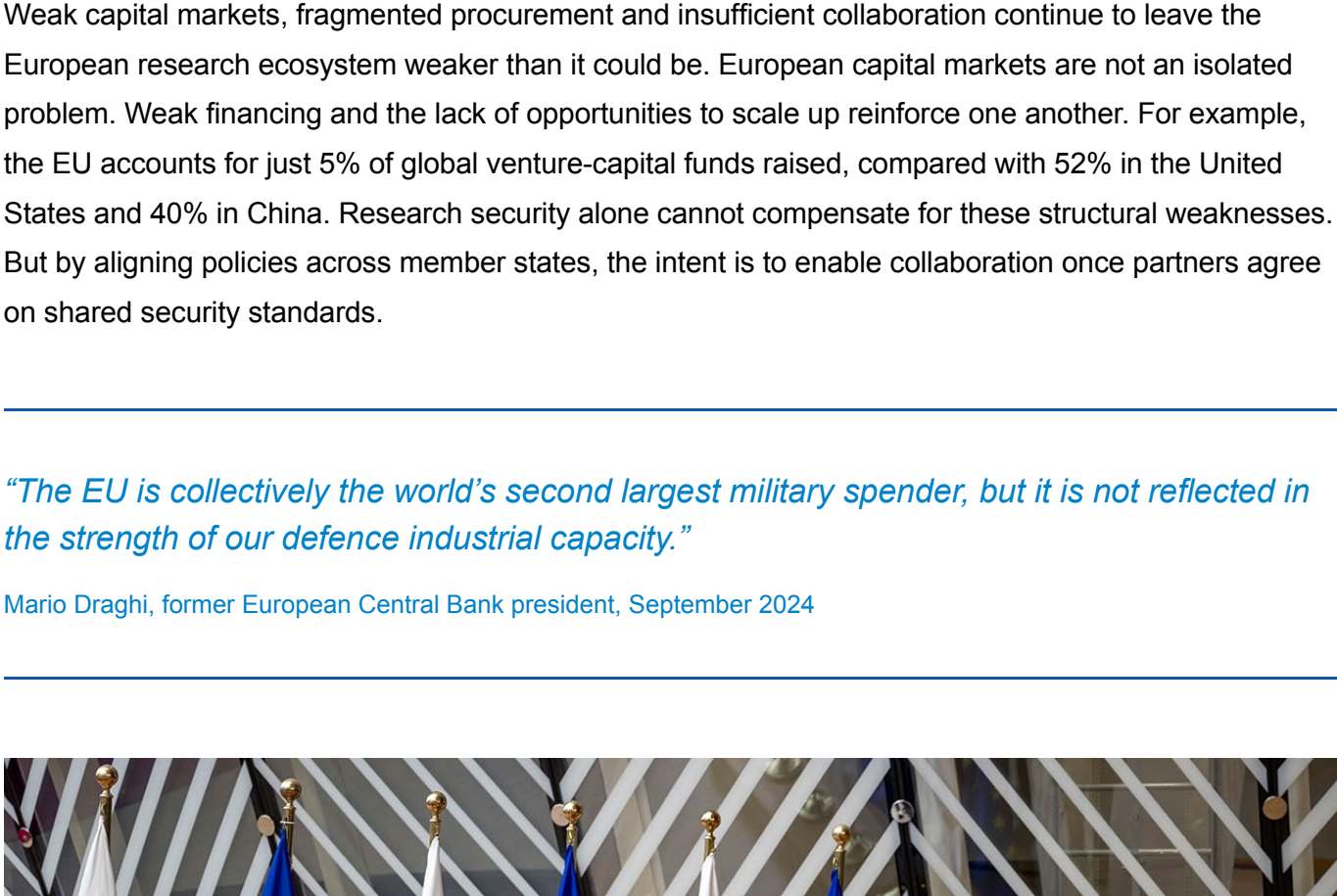
As states and businesses become more entangled, this may contribute to global economic fragmentation and the weaponisation of economic dependencies. Governments increasingly view control over critical technologies as an instrument of national power and military pre-eminence, with some competitors pursuing civil–military fusion strategies. Companies developing frontier technologies are becoming more closely associated with the strategic interests of their home states.

This poses a dilemma for Europe. The EU defence sector suffers from structural weaknesses and decades of underinvestment, leaving it highly dependent on non-EU suppliers. Selective derisking is unavoidable, but deciding where interdependence becomes an unacceptable vulnerability is technically and politically difficult. Reducing dependence too quickly could be costly, restrict access to world-leading innovation and undermine Europe's commitment to an open economy. But continued reliance on foreign providers creates risks ranging from supply-chain disruption to strategic dependence.

"If Helsing [European defence-technology company] fails, it will be because European defence culture and procurement did not evolve and modernise as quickly as it needed to."

Observer, 14 September 2025

EU member states with highest R&D spend and Innovation Index Score



Collaboration

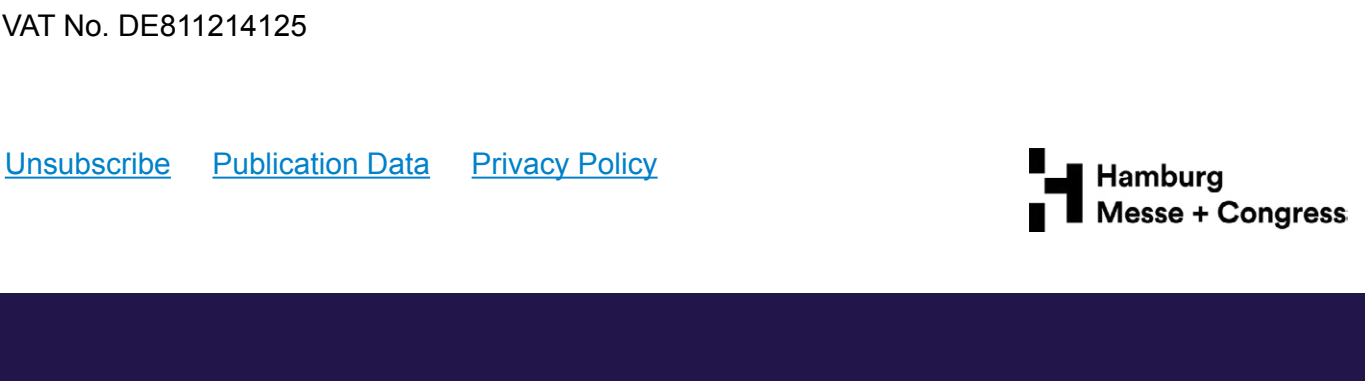
Uneven implementation will almost certainly create regulatory arbitrage. Actors unable to access well-protected institutions will redirect their activity towards member states or research organisations with weaker screening and fewer resources. Collaboration with EU-adjacent and trusted third countries is expected to be a key part of the ERA Act and is already a central component of the new European Framework for Science Diplomacy. The EU's funding programme, Horizon Europe, remains open to the world, offering association to countries with strong science and technology capacities that share EU values.

As of October 2025, there are 22 third countries associated with Horizon Europe, including recent additions like New Zealand. These associated countries are included in continuous open consultations for the upcoming ERA Act. While they are expected to adhere to a new, higher level of research security, this collaboration serves not only to support the EU's research ambition but also to advance its foreign-policy goals. Science diplomacy acts as a tool to maintain dialogue, project European values and tackle global challenges through secure, shared knowledge. The ERA Act is an attempt to address European weaknesses in R&D. The continent consistently produces world-class research but struggles to convert scientific excellence into globally competitive companies and deployable capabilities (see infographic).

Weak capital markets, fragmented procurement and insufficient collaboration continue to leave the European research ecosystem weaker than it could be. European capital markets are not an isolated problem. Weak financing and the lack of opportunities to scale up reinforce one another. For example, the EU accounts for just 5% of global venture-capital funds raised, compared with 52% in the United States and 40% in China. Research security alone cannot compensate for these structural weaknesses. But by aligning policies across member states, the intent is to enable collaboration once partners agree on shared security standards.

"The EU is collectively the world's second largest military spender, but it is not reflected in the strength of our defence industrial capacity."

Mario Draghi, former European Central Bank president, September 2024



Conclusion

The ERA Act will establish the common standards needed for secure collaboration. But standards are only a starting point. Its success will depend less on the legislation itself than on how consistently it is implemented, an area that the EU has traditionally left to member states. The most likely outcome is a modest and uneven improvement. Europe is likely to make real progress on shared definitions and due diligence, but far less on the capital and procurement weaknesses that prevent European science from translating into European power. The act should make Europe more secure. It won't, on its own, make it more competitive.

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