

Market orientation

Market study opportunities for the Dutch defence Industry in international defence value chains - Ref. nr. 202606057

Organisation: The Netherlands Enterprise Agency (RVO) – Ministry of Economic Affairs and Climate policy

The Netherlands Enterprise Agency (in Dutch: Rijksdienst voor Ondernemend Nederland, RVO) supports private and public organisations with funding, international business partners, knowledge, and regulations.

More information about RVO can be found on: www.rvo.nl and <http://english.rvo.nl/>.

This specific project has been commissioned by the Business Development team at RVO, in assignment of the International Enterprise Department (Directie Internationaal Ondernemen - DIO) of the Ministry of Foreign Affairs (Ministerie van Buitenlandse – Zaken).

Purpose of the notification

The purpose of this market orientation is to identify the interest of qualified organisations or consultants available and able to carry out this assignment.

This market orientation is not a request for proposal. It is not allowed to send a proposal or motivation letter.

Extent and duration of the assignment

The assignment entails a market study into opportunities for the Dutch private sector in international defence value chains and is planned to initiate 1 October 2026. The final finished product and related services must be delivered by 31 December 2026.

Budget indication

The maximum budget indication is €100,000 excluding Dutch VAT and (if applicable) including local VAT and all other costs and/or fees, such as travel expenses, overhead and communication.

Purpose of the assignment

The overall purpose of this assignment is to fill the current information gap and support Dutch private-sector companies in identifying and pursuing opportunities within EU and NATO defence value chains. It shall provide in-depth insights into the structure and functioning of the European defence industry and serve as a foundation for any future governmental trade activities within the defence sector.

Goals and deliverables

Specifically, the market study will:

- Identify and assess the defence value chains that offer the greatest potential and strategic relevance for the Dutch private sector.
- Determine which Dutch components, subsystems, and end products present the strongest commercial opportunities within these value chains.
- Provide practical, actionable guidance on how Dutch companies can access these markets, including clear entry pathways and roadmaps.

Expected Outcomes

1. Insights into defence value and supply chains

To a large extent, opportunities for the Dutch private sector lie within international supply chains, particularly at the tier-1 and tier-2 level. The market report should therefore provide detailed insights into the structure of these defence supply chains, including:

- Identification of the most important system integrators and major defence companies operating within Europe and NATO markets;
- Identification of the most important tier-1 en tier-2 suppliers;
- Analysis of gaps and missing links within these structures that may represent opportunities for Dutch expertise and capabilities.

2. Alignment with Dutch Defence Priority Segments

The study is expected to demonstrate a clear connection between the identified opportunities and the Netherlands' defence priority segments: Sensors, Smart Materials, Intelligent Systems, Space, Quantum and Maritime Technology.

While commercial opportunities are anticipated to lie predominantly within Sensors, Smart Materials, and Intelligent Systems, the scope of the research should not be limited to these areas. Where relevant, the study should also identify and assess additional sectors with significant potential, such as metal manufacturing and processing, if they emerge as commercially viable within the analysed defence value chains.

3. Access to defence-related tenders

Defence markets operate through 'closed' networks and long-term industrial partnerships. The study should therefore provide practical insight into how Dutch companies can access international defence projects, including:

- The primary channels through which Dutch companies could gain access to defence procurement and programmes.
- The role and necessity of cooperation with local partners in target markets.
- The extent to which local production, joint ventures or industrial participation and offset requirements are typically expected or mandated.

4. Approach strategies

The market study shall provide recommendations for Dutch companies on the strategies for entering the in European and NATO defence value chains as well as a concise, general overview of the relevant regulatory and compliance landscape. The report should outline the main regulatory frameworks, typical compliance expectations, and the most common barriers to entry for new suppliers, without providing an extensive or exhaustive analysis.

5. Role of large industrial players

The European and NATO defence sector is to a certain extent dominated by a limited number of large industrial companies. Thus, the study shall analyse:

- The strategic priorities and investment plans of these companies.
- The regions, markets or value chains where they seek international partners, outside of the local sourcing clause.
- How Dutch companies could gain access to their supply eco systems.

6. Selection of Commercially Viable Value Chains

The final selection of the commercial most viable value chains will be determined based on the outcomes of the research questions outlined above. During the research, the consultant shall coordinate closely with the Netherlands Enterprise Agency (RVO) to ensure alignment in the process of selecting these value chains. Based on preliminary desk research and an assessment of European demand, an initial list of potential value chains has been identified. This list is intended to serve as a starting point for further analysis and identification, and includes:

- Air & Missile Defence
- Drones & Counter-Drone Ecosystem

- Military Electronics, Sensors & Semiconductors
- Defence AI, Software & Battlefield Cloud
- Military Mobility & Logistics Infrastructure
- Armored Vehicles & Ground Combat Systems
- Maritime

Individual consultants and firms with expertise in the European defence industry or with demonstrable experience in similar market research are invited to send an expression of interest to the contact person mentioned below.

Requirements

In addition to the requirements set out above, the following requirements are imposed on the work.

- Consultants or firms should demonstrate the following qualifications and experience:
 - Proven track record in conducting and delivering market research studies within the defence industry;
 - Deep knowledge and experience in the European/NATO defence sector, including understanding of value chains, procurement mechanisms, and industrial partnerships ;
 - Based in Europe, with the ability to engage effectively with European and NATO stakeholders;
 - At least one of the team member must be fluent in English, at least C1-level according to the CEFR (spoken & written) or equal;
 - The ability to advise on the most appropriate scope and breadth of the study to ensure the expected outcomes outlined in this document are achieved.

In addition to the requirements, the following is considered an advantage:

- An extensive network within the European and NATO defence and security sectors, including private industry and relevant stakeholders;
- knowledge of and a network in the Dutch defence sector as well as the broader business community in the Netherlands.

Application

Interested companies are invited to send an expression of interest to RVO by sending an e-mail to Leonie Verhoef leonie.verhoef@rvo.nl with copy to Jeannette Keyzer, jeannette.keyzer@rvo.nl of the IUC Procurement Office. Please state the name of the contact person of your company and his or her e-mail address.

Please only send a short message that you are interested and available for this assignment. Including a short description of why you deem yourself / your organization to be suitable for this assignment.

As a result of the market orientation, RVO can decide to launch a formal procurement process. Interested parties can be invited in this process to submit a request for proposal. If more than 5 applicants respond to the market orientation, a supplier selection can take place on the basis of a selection prior to the request for proposal. This market consultation does not create an obligation to pursue a formal procurement process.

In case of a follow-up process, no distinction will be made between parties that have or have not participated in the market orientation.

Deadline

The deadline for responding to this market orientation is set at 8 July 2026, 14:00 (CEST).

Yours sincerely,
Leonie Verhoef
Procurement Officer

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Ministry of Economic Affairs
Netherlands Enterprise Agency