



# WHAT IS THE PERCEPTION OF DEFENCE INDUSTRIAL PARTNERSHIPS WITH THE EDTIB BY NON-EU COUNTRIES?

## The case of Ukraine : Changing the paradigm

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## ABOUT THE AUTHOR



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Mykhailo is a chief and one of the drivers of new international project 'The New Geopolitics Research Network' which is an independent and nonpartisan initiative to provide a think tank platform for researchers, academics, experts, journalists, intellectuals who aspire to shape a new facets of geopolitics. After 20 years in media as well as in security and defence analysis and consultancy, Mykhailo is an experienced researcher in the sphere of international relations, national resilience and new generation warfare.



The Armament Industry European Research Group (Ares Group) was created in 2016 by The French Institute for International and Strategic Affairs (IRIS), who coordinates the Group. The aim of the Ares Group, a high-level network of security and defence specialists across Europe, is to provide a forum to the European armament community, bringing together top defence industrial policy specialists, to encourage fresh strategic thinking in the field, develop innovative policy proposals and conduct studies for public and private actors.

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## ABSTRACT

The transition of the Russian-Ukrainian war into a confrontation of attrition puts forward new requirements for the development of the defence industry base of Ukraine and the EU, as well as for the most effective cooperation between the Ukrainian and European defence industries. The real situation on the frontline creates new impulses and paradigms for meeting the needs of the Armed Forces of Ukraine, with an emphasis on high-tech weapons and military equipment that provide an "asymmetric" advantage over the enemy.

In times of war, cooperation in the defence industry between Ukraine and the EU focuses on the immediate needs of the Armed Forces of Ukraine for both basic weapons (ammunition, artillery, armoured vehicles, air defence, etc.) and advanced high-tech systems used on the battlefield. Instead, participation in projects that have uncertain time, financial and technological frameworks is considered unreasonable.

Further development of Ukraine's cooperation with the EU in the defence industry should be built through the prism of the new EU Capability Development Plan and the joint European Defence Industry Strategy (EDIS), with a focus on projects involving and coordinated by the European Defence Agency. In addition, the introduction of cooperation models based on the example of the Accelerator and Brave1 Ukrainian platforms could be effective. This could create new opportunities for the development of bilateral projects between Ukrainian and European defence companies to achieve concrete practical results in the shortest possible time.

**Keywords:** War | priorities | DFNC

## INTRODUCTION

The current phase of Russia's war against Ukraine has all the hallmarks of an armed struggle turning into a war of attrition. Russia, trying to use its advantage in resources, is increasing the production of weapons and military equipment to achieve success on the battlefield in the medium and long term. Objectively, Russia will have more human resources, economic potential, armoured vehicles and will be able to produce ammunition, missiles, and attack drones faster (as well as receive them from North Korea and Iran with the support of China) for a long period of time.

In this situation, it is difficult for Ukraine to prepare a symmetrical response to the Russian threat. The way to gain an advantage over the enemy is asymmetry. That is, when technological superiority on the battlefield allows to ensure parity of combat capabilities against a larger enemy. However, the experience of the war of 2022-2023 shows that it is necessary not only to produce high-tech products, but also to do so in sufficient quantities. In other words, it is critically important for Ukraine to produce (and receive from its allies) a sufficient number of high-tech weapons with a constant increase in production. Because Russia, along with its allies (North Korea, Iran, and to a large extent China), is on a path of constant increase in the supply of arms and military equipment.

## ASYMMETRY AS A COUNTERACTION TO MASS

The experience of combat operations of the Russian-Ukrainian war shows that it is expedient to change priorities in the development and production of weapons and military equipment, with an emphasis on mass production of weapons that provide a technological, i.e., "asymmetric" advantage to the Armed Forces of Ukraine on the battlefield.

Examples of such systems that have proved extremely effective at the front are well known: FPV drones; loitering munitions of tactical, operational and strategic level; reconnaissance UAVs; ground-based autonomous systems, including those for demining; unmanned maritime strike and reconnaissance platforms for operations in the Black Sea. The extensive deployment of drones revolutionises the acceleration of military control cycles. Drones seamlessly integrate intelligence-gathering capabilities, target coordinate determination, command and control systems, and strike mechanisms into a unified network. This integration enables real-time detection and neutralisation of enemy forces, delivering a decisive asymmetric advantage on the battlefield. In addition, electronic warfare systems for various purposes (including electronic warfare systems that can protect an individual soldier, combat

vehicle, or defensive position) play an extremely important role in the conduct of combat operations by the Armed Forces of Ukraine.

On the other hand, to effectively conduct defensive and offensive operations, it is critical for Ukraine to provide its Armed Forces with basic combat capabilities, i.e., a sufficient number of artillery systems and ammunition, armoured vehicles of various types, high-precision strike tools, air and missile defence systems, communications, command and control, and intelligence, as well as combat aircraft that will be able to neutralise Russia's air superiority over the battlefield.

It is difficult for Ukraine to accomplish such a large number of tasks on its own. In a time of war, building the most effective formats of cooperation with the EU in the security, defence, and defence-industrial sectors is of existential importance to Ukraine. For Ukraine, the goals of such cooperation are clear : meet the needs of the Armed Forces in both the short and long term. And it is through this prism that Ukraine views both the cooperation with the EU and the internal processes of developing the defence industry base of the EU countries.

## **TRANSFORMATION OF THE EU DEFENCE POLICY**

At the same time, since the beginning of Russia's large-scale aggression against Ukraine, the European Union has been in a dynamic and complex process of transforming its security, defence and defence-industrial policies. The ideas of "strategic autonomy of Europe", which are increasingly filling the discussion field of European politicians and experts, are already having an impact on the development of the European defence industry. However, so far, it is more in the semantic sense. Real changes will require significant efforts by EU countries on the legislative, structural, and organisational levels.

Over the past decades, the EU has struggled to develop an effective integrated defence policy and common industrial base. However, the results have not given much cause for optimism. Despite the long-standing functioning of the European Defence Agency and the implementation of dozens of projects based on the pooling & sharing principle and on initiatives as PESCO, Europe has not managed to get rid of its fragmentation, duplication, lack of joint planning for the development and production of weapons and military equipment. The EU often ineffectively sets priorities for the development of key arms programs and their budgeting.

A typical example of the lack of foresight and effectiveness of joint European efforts in the defence industry is illustrated by the development of European advanced multifunctional

combat aircraft of the 5th-6th generations. Currently, two separate projects in this area are being implemented in Europe. France, Germany and Spain are going to create an aviation system of the future SCAF (Système de Combat Aérien du Futur)<sup>1</sup> worth about 100 billion euros. In turn, the United Kingdom, Italy, and Japan have joined the GCAP (Global Combat Air Program)<sup>2</sup> project to develop their own promising 6th generation combat aircraft. Both projects have a horizon of implementation until 2050-2060. In the context of the rapid development of unmanned technologies, as well as rapid geopolitical processes, the usefulness of both projects appear rather doubtful.

It is obvious that prioritisation of joint development and investment in new European defence technologies can only be successful if the majority of EU countries are better coordinated and jointly involved. In this regard, the practical implementation of the new EU Capability Development Priorities, which were approved in November 2023<sup>3</sup>, is critical. While maintaining a conceptual commitment to the goals of the EU Strategic Compass for Security and Defence<sup>4</sup>, the new Priorities are based on the results of a review of the EU Capability Development Plan, taking into account changes in the EU's strategic environment and the lessons of Russia's war against Ukraine.

In turn, the adoption in March 2024 of the first joint European Defence Industry Strategy<sup>5</sup> (EDIS) in the history of the EU creates conditions for increasing the effectiveness of the coordination between Member States and identification of the needs of their armed forces. However, the adoption of EDIS has not yet been accompanied by a serious budget, which means that structural solutions that would clearly indicate the political commitment of the EU countries to begin radical changes in national planning systems are lacking<sup>6</sup>. Obviously,

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<sup>1</sup> Sabine Siebold, Michel Rose (2022). *France, Germany, Spain agree on moving on with FCAS warplane development*. Retrieved April 23, 2024, from <https://www.reuters.com/business/autos-transportation/france-germany-spain-agree-next-phase-fighter-jet-development-source-2022-11-18/>

<sup>2</sup> Tom Kington (2023). *UK, Italy, Japan companies eye novel sensor mix for GCAP warplane*. Retrieved April 23, 2024, from <https://www.defensenews.com/global/europe/2023/09/11/uk-italy-japan-companies-eye-novel-sensor-mix-for-gcap-warplane/>

<sup>3</sup> European Defence Agency (2023). *The 2023 EU Capability Development Priorities*. Retrieved April 24, 2024, from <https://eda.europa.eu/docs/default-source/brochures/qu-03-23-421-en-n-web.pdf>

<sup>4</sup> Council of the EU (2022). *A Strategic Compass for Security and Defence*. Retrieved April 24, 2024, from [https://www.eeas.europa.eu/sites/default/files/documents/strategic\\_compass\\_en3\\_web.pdf](https://www.eeas.europa.eu/sites/default/files/documents/strategic_compass_en3_web.pdf)

<sup>5</sup> European Commission (2024). *EDIS, Our common defence industrial strategy*. Retrieved April 24, 2024, from [https://defence-industry-space.ec.europa.eu/eu-defence-industry/edis-our-common-defence-industrial-strategy\\_en](https://defence-industry-space.ec.europa.eu/eu-defence-industry/edis-our-common-defence-industrial-strategy_en)

<sup>6</sup> In presenting EDIS, the Commission also put forward a proposal for a defence industry support programme, the European Defence Industrial Programme (EDIP). For the moment, however, EDIP only has a budget of €1.5 billion for three years (2025-2027) at continental level. This budget could be increased in the future, but at this stage there are still a number of uncertainties.

without political and financial commitments, the provisions of the new strategy may remain wishes that will not be implemented in practice.

## PRIORITISING EU COOPERATION WITH UKRAINE

At the same time, paradoxically, new prospects for creating a truly effective system for the development of the defence industry and, in general, the EU security and defence architecture are opened by the inclusion in the EDIS of the requirement to prioritise relations with Ukraine. This might involve Ukraine playing a larger role in implementing EU defence and industrial programs, leveraging its experience in rapidly adapting these capabilities in response to the dramatic shifts caused by Russian aggression. Furthermore, projects within the Ramstein Format that include EU and NATO countries alongside Ukraine could provide valuable insights for the EU.

Establishing hubs at the EU level, such as the Accelerator<sup>7</sup> and Brave1<sup>8</sup> Ukrainian platforms, could provide a new technological and structural impetus to the European defence industry. Ukrainian Ministry of Defence has created a special structure - The Innovation Development *Accelerator* - responsible for optimising the process of adopting new weapons and military equipment into the service of the UAF. As a direct outcome of the *Accelerator's* initiatives, the process of integrating weapons and equipment into the service of the Ukrainian Armed Forces has been streamlined to just 1.5 months, a substantial improvement from the previous timeline of over 2 years. The Ministry of Digital Transformation also created *Brave1*, a cluster to promote the development of defence technologies. The main task of *Brave1* is to coordinate the activities of government agencies - the Ministry of Defence, the Armed Forces, the Ministry of Digital Transformation, the Ministry of Economy, the Ministry of Strategic Industry in the development of defence technologies and production. Similarly, *Brave1* is designed to create a strong community of Defense Tech foreign stakeholders who benefit from exchanging expertise and opportunities.

Also, the format tested within the Ukraine Defence Contact Group ("Ramstein format") could become a model for the creation and development of joint projects in the field of building up the national armed forces of European countries and Ukraine, as well as joint defence industrial concepts. The main principle of the "Ramstein format" is coordination of efforts and

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<sup>7</sup> Accelerator Ministry of Defence of Ukraine (2023). *Ministry Implementing solutions for the victory speeding up operations in the Ministry of Defence*. Retrieved April 25, 2024, from <https://mil-tech.gov.ua/en>

<sup>8</sup> Brave 1. Ukrainian Defense Innovations (2022). *United Coordinational Platform for Defense Tech Powered by the Government*. Retrieved April 25, 2024, from <https://brave1.gov.ua/en/>

resources in those areas that require maximum attention and efficiency, which can be joined by countries that wish to do so and have the necessary capacity (budgeting, production, technological advantages, attracting investments from third countries, etc.). This approach, which demonstrates maximum creativity in finding effective solutions to highly complex problems, avoids dispersion and duplication of resources and focuses on the most relevant areas of work.

A step forward in the formation of a new mechanism for cooperation between Ukraine and Western defence companies was the first International Defence Industries Forum (DFNC1<sup>9</sup> held in Kyiv in September 2023, which was attended by 252 companies from 30 countries. The Forum was focused on practical cooperation and the foundation of specific projects for the production of weapons in the interests of the Ukrainian Defence Forces. As a result of the Forum, several dozen cooperation agreements were signed between Ukrainian and foreign partners. These include agreements and memorandums on the production of drones, repair and production of armoured vehicles, ammunition, etc. The cooperation formats include joint production, technology exchange, and supply of components.

As a follow-up to DFNC1, a separate Ukraine-U.S. Defence Forum<sup>10</sup> was held in December 2023, during which specific projects between Ukrainian and American defence companies were launched. In March 2024, Kyiv hosted the defence industry conference DFNC1: Danish Edition, which was attended by 63 Ukrainian companies and 34 Danish companies<sup>11</sup>.

Taking this experience into account, the EU-Ukraine Defence Industry Forum (DFNC1: EU Edition)<sup>12</sup> was held in May 2024, which was the first concrete step in the implementation of the European Defence Industrial Strategy (EDIS) in the development of cooperation between Ukraine and the European Union. The forum paves the way for the identification of specific initiatives, agreements and flagship projects for cooperation between the defence industries of Ukraine and the EU, including through the establishment of joint ventures. This will facilitate closer cooperation between defence companies and the gradual integration of the

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<sup>9</sup> International Defence Industries Forum (2023). *Arsenal of the Free World: Results of the First International Defense Industries Forum*. Retrieved April 25, 2024, from <https://dfnc.gov.ua/arsenal-of-the-free-world-results-of-the-first-international-defense-industries-forum/>

<sup>10</sup> DFNC1: US Edition (2023). Retrieved April 26, 2024, from <https://www.kmu.gov.ua/news/dfnc1-us-edition-pershi-rezultaty-spilnoi-amerykansko-ukrainskoi-konferentsii-shchodo-spilnoho-vyrobnystva-ozbroiennia>

<sup>11</sup> DFNC1: Danish Edition (2024). Retrieved April 26, 2024, from <https://mbsp.gov.ua/news/dfnc1-danish-edition-ukraina-i-daniia-pohlybliuiut-spivpratsiu-v-haluzi-oboronnykh-tekhnologii>

<sup>12</sup> Ministry for Strategic Industries of Ukraine (2024). *Deepening cooperation between the Ukrainian and European defence industries: the EU-Ukraine Defence Industries Forum took place in Brussels*. Retrieved April 27, 2024, from <https://www.kmu.gov.ua/news/posylennia-spivpratsi-mizh-ukrainskoiu-ta-ievropeiskoio-uboronnoiu-promyslovistiu-u-briusseli-vidbuvsia-forum-oboronnykh-industrii-ukraina-ies>



Ukrainian defence industry into the European defence technology and industrial base, including in view of Ukraine's accession to the EU.

## KEY TAKEAWAYS

Given the unique dynamics of today's military and political landscape, along with the ongoing Russian-Ukrainian conflict, it's essential to reassess how Ukraine approaches its defence responsibilities. This involves prioritising technological advancement on the battlefield and establishing robust defence industry capabilities. These measures are crucial for consistently furnishing the Armed Forces with cutting-edge weaponry and military gear.

Under these conditions, Ukraine's defence industrial cooperation with European countries is primarily focused on achieving practical results in the shortest possible time to meet the immediate needs of the Armed Forces. Long-term, resource-consuming, bureaucratised projects with uncertain goals and implementation horizons, which often compete with each other, obviously cannot be a priority for Ukraine.

Projects within the framework of the European Commission and European Defence Agency may be promising, including in the context of Ukraine's integration into the EU. However, this direction requires efforts not only from Ukraine, but also from the point of view of modernising the functioning of the Agency itself. Taking into account the lessons of the Russian-Ukrainian war and focusing on a specific result in order to improve the efficiency of the EU's defence industry base can obviously become key principles of the EDA modernisation.

Against this backdrop, bilateral projects between individual Ukrainian and European companies to achieve concrete practical results in the shortest possible time may be the most optimal from the point of view of Ukraine's interests. To date, initial collaborations between Ukrainian and European companies have commenced in the fields of armoured vehicles, ammunition, drones, and electronic warfare. Furthermore, the bilateral security agreements signed by Ukraine and its allies possess significant potential for growth within the defence sector. These political frameworks serve as a solid foundation for cooperation between defence industries and for advancing the standardisation and interoperability of weapon systems. The integration of public resources and private enterprises from European nations and Ukraine into joint defence initiatives will inject fresh momentum into the development of both the European and Ukrainian defence industrial bases, as well as their combined defence industrial capabilities.

The development of the format of the International Defence Industries Forum (DFNC1) in both global and regional versions (in particular, with EU nations) can become an effective mechanism for implementing defence industry projects in the interests of the Ukrainian defence industry.

It's also important to take note of the EU's recent endeavours to bolster defence industry capabilities, specifically the rollout of the European Defence Industry Strategy (EDIS) and the execution of the EU's 2023 Capability Development Priorities.

Simultaneously, the European Union might find Ukraine's advancements in crafting and deploying modern frameworks for rapidly advancing military technologies intriguing, such as the "Accelerator" model by the Ministry of Defence and "Brave1" by the Ministry of Digital Transformation. These could potentially open up new avenues for collaborative ventures in planning the evolution of armed forces and military hardware. Similarly, the adoption of methodologies utilised within the Ukraine Defence Contact Group ("Ramstein format") could be explored in this context.

Among the concrete steps, it would be important for Ukraine to gain greater access for Ukrainian specialists (both public and non-governmental) to work in the EDA apparatus in full-time positions to bring Ukraine and the EU closer together in the defence industry.

This, in turn, could help to intensify and make more effective cooperation between Ukrainian and European companies in the urgent areas of defence-industrial cooperation, focusing on the needs of the Armed Forces of Ukraine at the front but also on promising areas for the European Union.

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