



**Hermes Institute of  
International Affairs,  
Security & Geoeconomy**

## **OCCASIONAL PAPER 2/2024**

### **The First Ever 2024 European Defense Industrial Strategy:**

Background, Challenges and Future Considerations  
Regarding the European Security and Defense

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## Abstract

Russia's invasion in Ukraine on *February 24<sup>th</sup>, 2022* put an end on the long period of peace that was the norm in the European continent. This ongoing situation worked as a catalyst for many changes in the security and defense landscape as it reminded everyone that hard power remains the cornerstone of a state's or organization's foreign policy, forcing *Josep Borrell* - the High Representative of the Union for Foreign Affairs and Security Policy/Vice-President of the European Commission - to state that "*Europe must learn to speak the language of power.*"

Towards this direction, the European Union issued the 2022 "*Strategic Compass*," a strategic document that provides a common strategic vision for the EU's role in security and defense and specific objectives in order to become a stronger and more capable security provider. In order to support this effort and coordinate its member-states' actions as far as the defense industry is concerned, the EU issued on *March 5<sup>th</sup>, 2024* its first-ever "*European Defence Industrial Strategy*" aiming at the establishment of a more responsive and resilient European defense industry and the development of a defense readiness culture among its member-states.

The aim of this paper is to analyze the *context* of the first ever "*European Defence Industrial Strategy*," to assess the *effectiveness* of the measures taken, and to provide several considerations regarding the European security and defense sector. Its bibliography is based on academic papers, articles and official documents, and the research method used is the qualitative method. It includes a brief presentation of the history of the European Union focusing on how it evolved from an economic union to a security provider, the description of the context of its first 2024 Defense Industrial Strategy, an analysis of the aforementioned Strategy and some future considerations as far as the European security and defense sector is concerned including a special reference in the future of the Hellenic defense industry.

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**Key Words:** European Union, Defense, Security, Strategic Compass, Strategy, Industry, Technology, Innovation, Research, Investments, Resilience, Readiness, Culture

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## Table of Abbreviations

ASAP	Act in Support of Ammunition Production
CARD	Coordinated Annual Review on Defense
CDP	Capability Development Plan
CFSP	Common Foreign and Security Policy
CSDP	Common Security and Defense Policy
DEFIS	Defense Industry and Space
DG	Directorate-General
DIANA	Defense Innovation Accelerator for the North Atlantic
DIRB	Defense Industrial Readiness Board
ECSC	European Coal and Steel Community
EDA	European Defense Agency
EDF	European Defense Fund
EDIG	European Defense Industry Group
EDIP	European Defense Industrial Programme
EDIRPA	European Defense Industry Reinforcement Procurement Act
EDIS	European Defense Industrial Strategy
EDTIB	European Defense Technological and Industrial Base
EEAS	European External Action Service
EEC	European Economic Community
EFSP	European Foreign and Security Policy
EIB	European Investment Bank
EPF	European Peace Facility
EU	European Union

EUDI	EU Defense Industry
EUDIS	EU Defense Innovation Scheme
FAST	Fund to Accelerate Defense Supply Chain Transformation
FYROM	Former Yugoslav Republic of Macedonia
GDP	Gross Domestic Product
HEDI	Hub for EU Defense Innovation
HR/VP	High Representative of the Union for Foreign Affairs and Security Policy/Vice-President of the Commission
MFF	Multi-Annual Financial Framework
NATO	North Atlantic Treaty Organization
NSPA	NATO Support and Procurement Agency
PCI	Project of Common Interest
PESCO	Permanent Structured Cooperation
R&D	Research and Development
SEAP	Structure for European Armament Program
SMEs	Small and Medium-sized Enterprises
STANAG	Standardization Agreement

## 1. Introduction

On *March 5<sup>th</sup>, 2024* the European Union published its first-ever European Defense Industrial Strategy (EDIS) entitled “*A new European Defence Industrial Strategy: Achieving EU readiness through a responsive and resilient European Defence Industry*,” a strategic document that aims to enhance and support the efforts of the EU’s member-states in order to increase and improve their investments in security and defense, facilitate their collaboration and coordinate their actions in the security and defense sector<sup>1</sup>. In addition to EDIS, the EU Commission proposed a Regulation in order to establish a “*European Defence Industrial Program*” (EDIP) that will allow the implementation of the measures defined in EDIS.

The main purpose of every strategy is to provide the framework in which all the stakeholders must act in order to develop their own course of action (detailed plans). Moreover, the majority of scholars agree that the main elements of a strategy comprise the desired “*ends*” (goals) that must be achieved, the necessary “*means*” that must be used and the defined “*ways*” that must be followed in order to achieve the aforementioned ends, in addition to an assessment of the current situation, depending on the kind of the strategic document (e.g. in most security strategies the current situation describes the existing and emerging security threats/risks of the security environment).

It must also be stressed that industry is defined as a “[...] *group of productive enterprises or organizations that produce or supply goods, services, or sources of income*”<sup>2</sup>. Thus, defense industry comprises all those enterprises or organizations that produce or supply goods, services, or sources of income that are related to the Defense sector of a state or organization. As far as the EU Defense Industry (EUDI) is concerned, the EU has established a Directorate-General for Defense Industry and Space (DG-DEFIS) which aims to strengthen the competitiveness and innovation of the EUDI by ensuring the evolution of an able European Defense Technological and Industrial Base (EDTIB)

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<sup>1</sup> European Commission. *First ever Defence Industrial Strategy and a New Defence Industry Programme to Enhance Europe's Readiness and Security* [Press Release]. 05 March 2024. [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_24\\_1321](https://ec.europa.eu/commission/presscorner/detail/en/IP_24_1321) (07/03/2024).

<sup>2</sup> Britannica Money. *Industry*. No date. <https://www.britannica.com/money/industry> (13/03/2024).



through investments and the use of various tools such as the European Defense Fund (EDF)<sup>3</sup>.

Moreover, according to the official page of the DG-EDIS, the EU supports EUDI through the following actions:

- ✓ Developing Tomorrow's defense capabilities,
- ✓ Procuring defense capabilities,
- ✓ Boosting defense production, and
- ✓ Other actions, such as military mobility, transfers of defense related products, skills development, etc.

## 2. From an Economic Union to a Security Provider: A Short History of the EU

The European Union (EU) was founded in 1951 as the European Coal and Steel Community (ECSC), aiming at the enhancement of the solidarity of the European states and the promotion of peace through pooling coal and steel production. In 1957 the ECSC was transformed into the European Economic Community (EEC), allowing its Member States (MS) to expand their cooperation in several fields of the economy, leading among others to a Common Agricultural Policy in 1962 and a Customs Union in 1968<sup>4</sup>. In 1993 the EEC was transformed into the EU under the Maastricht Treaty, and addressed security issues for the first time establishing the Common Foreign and Security Policy (CFSP) which aims at the preservation of peace and the strengthening of international security<sup>5</sup>.

In the 2003 the EU issued its first European Security Strategy<sup>6</sup>, while in 2007 reinforced CFSP through the signing of the Treaty of Lisbon<sup>7</sup>. In 2011 the EU established

<sup>3</sup> European Commission. "The EU Defence Industry." *Defence Industry and Space*. No date. [https://defence-industry-space.ec.europa.eu/eu-defence-industry\\_en](https://defence-industry-space.ec.europa.eu/eu-defence-industry_en) (13/03/2024).

<sup>4</sup> European Union. *History of the EU*. No date. [https://european-union.europa.eu/principles-countries-history/history-eu\\_en](https://european-union.europa.eu/principles-countries-history/history-eu_en) (20/03/2024).

<sup>5</sup> EUR-Lex. *Common Foreign and Security Policy (CFSP)*". No date. <https://eur-lex.europa.eu/EN/legal-content/glossary/common-foreign-and-security-policy-cfsp.html> (20/03/2024).

<sup>6</sup> Council of the European Union. *European Security Strategy - A Secure Europe in a Better World* [Official Document]. 06 April 2022 (Last reviewed). <https://www.consilium.europa.eu/en/documents-publications/publications/european-security-strategy-secure-europe-better-world/#:~:text=The%20European%20Council%20adopted%20the,approach%20and%20remains%20fully%20relevant.> (20/03/2024).

<sup>7</sup> Pavy Eeva. *The Treaty of Lisbon*. European Parliament. October 2023. <https://www.europarl.europa.eu/factsheets/en/sheet/5/the-treaty-of->

the European External Action Service (EEAS) in order to implement the CFSP through the Common Security and Defence Policy (CSDP)<sup>8</sup>, and in 2016 issued its second security strategy known as Global Strategy<sup>9</sup>. Since 2003, the EU has established several CSDP missions, demonstrating its enhanced role as far as security is concerned, a role that has been gradually enhanced through time.

On March 21<sup>st</sup>, 2022 – approximately a month after Russia’s invasion of Ukraine – the Council of the EU approved the third security strategy of the EU entitled “*A Strategic Compass for Security and Defence - For a European Union that Protects its Citizens, Values and Interests and Contributes to International Peace and Security*”<sup>10</sup>. Strategic Compass aims to make the EU a stronger and more capable security provider by 2030 by strengthening its security and defense policy<sup>11</sup>, through a plan of action that is structured around the following four pillars (Annex A):

- ✓ *ACT*: in order to develop the ability for rapid and robust action during crises,
- ✓ *SECURE*: in order to be able to anticipate, deter and respond in a better way to contemporary and emerging threats and challenges, and safeguard its security interests,
- ✓ *INVEST*: in order to enhance the Defense expenditures of the EU’s member-states, reduce the existing critical capability gaps in the military and civilian sector and strengthen the EDTIB, and
- ✓ *PARTNER*: in order to tackle threats and challenges faced by both the EU and its partners.

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[lisbon#:~:text=The%20Treaty%20of%20Lisbon%20formally,Council%20has%20no%20legislative%20functions.](#) (21/03/2024).

<sup>8</sup> Krentz Oliver. *Common Security and Defence Policy*. European Parliament. October 2023. <https://www.europarl.europa.eu/factsheets/en/sheet/159/common-security-and-defence-policy#:~:text=The%20CSDP%20is%20the%20main,strengthen%20international%20peace%20and%20security.> (21/03/2024).

<sup>9</sup> European Union External Action. *A Global Strategy for the European Union's Foreign and Security Policy* [Official Document]. 15 December 2019. [https://www.eeas.europa.eu/eeas/global-strategy-european-unions-foreign-and-security-policy\\_en](https://www.eeas.europa.eu/eeas/global-strategy-european-unions-foreign-and-security-policy_en) (21/03/2024).

<sup>10</sup> Κουκάκης Γεώργιος. *Προς τα που δείχνει η Στρατηγική Πυξίδα της Ευρωπαϊκής Ένωσης* [Where does the European Union’s Strategic Compass point to?]. *Center for International Strategic Analysis (KEDISA)*. 01 April 2022. <https://www.doi.org/10.13140/RG.2.2.11656.70406> (21/03/2024).

<sup>11</sup> Council of the European Union. *A Strategic Compass for a Stronger EU Security and Defense in the next Decade* [Press Release]. 21 March 2022. <https://www.consilium.europa.eu/en/press/press-releases/2022/03/21/a-strategic-compass-for-a-stronger-eu-security-and-defence-in-the-next-decade/> (21/03/2024)

### 3. The road to EDIS

In the context of the four pillars defined in the “*Strategic Compass*” and in accordance with the “*European Green Deal*,” Ursula von der Leyen – the President of the EU Commission – highlighted on her September 13<sup>th</sup>, 2023 State of the Union Address the importance of industry, not only for the economy but for the security and defense as well<sup>12</sup>. After the aforementioned speech, the Commission services in addition to European External Action Service (EEAS) and the European Defense Agency (EDA) began a consultation process with the EU member-states, the defense industry, the financial sector and several think tanks/academia<sup>13</sup>, leading to a Joint Communication by the EU Commission and the HR/VP that was published on March 5<sup>th</sup>, 2024.

The Joint Communication established the EDIS through which the EU provided for the following actions:

- ✓ Strengthen the EDTIB through increased, more collaborative and European investment from Member States,
- ✓ Improve the responsiveness of the European defense industry under any circumstances and time horizon,
- ✓ Mainstream a defense readiness culture, including across EU policies, and
- ✓ Team up with strategic, like-minded and international partners.

### 4. The Context of the EDIS

EDIS is a thirty-two pages-long strategic document comprising of an introduction, six main parts that analyze the main elements of the strategy and a final concluding part.

#### 4.1 Introduction

The first part “*Introduction*” (pages 1-2), stresses the need to strengthen the *EDTIB* in accordance with the 2022 Strategic Compass and the fact that the North Atlantic

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<sup>12</sup> European Union. 2023 *State of the Union Address by President von der Leyen* [Press Release]. 13 September 2023. [https://ec.europa.eu/commission/presscorner/detail/en/speech\\_23\\_4426](https://ec.europa.eu/commission/presscorner/detail/en/speech_23_4426) (21/03/2024).

<sup>13</sup> European Commission. “The European Defence Industrial Strategy (EDIS) at a Glance.” *Defence Industry and Space*. No date. [https://defence-industry-space.ec.europa.eu/eu-defence-industry/edis-our-common-defence-strategy\\_en](https://defence-industry-space.ec.europa.eu/eu-defence-industry/edis-our-common-defence-strategy_en) (21/03/2024).

Treaty Organization (NATO) remains the foundation of collective Defense for the European states despite the EU's efforts to become stronger and more capable in security and Defense. It underlines the need to increase the speed and number of the essential military equipment identified, developed and produced by the EDTIB using all the existing tools and instruments, in addition to the prioritization of the collaborative investments among member-states which will reinforce not only their national military capabilities but NATO's as well, since the member-states' available military forces are the same for every framework that they participate in.

Moreover, the document refers that the EU Defense industry is a vital factor that contributes to the development of the EU defense readiness, defining the latter as the:

*“[...] steady state of preparedness of the Union and its Member States to protect the security of its citizens, the integrity of its territory and critical assets or infrastructures, and its core democratic values and processes. This includes an ability to provide military assistance to its partners, such as Ukraine. In line with the Strategic Compass, it encompasses the ability to act more quickly and decisively when facing crises, secure [...] citizens against rapidly evolving threats, invest in the needed capabilities and technologies and partner with others to achieve common goals.”*

#### **4.2 A More Responsive and Resilient European Defense Industry**

The second part *“Achieving Defense Readiness through a more responsive and resilient European Defense Industry”* (pages 2-7), is divided into five subparts.

The first subpart entitled *“Defense readiness: imperative in the current geopolitical environment”* stresses the need to enhance the EU's Defense readiness due to several conventional and hybrid threats that endanger the rules-based order, the military build-up of many strategic competitors, and the use of strategic domains (air, maritime, cyber and space). It also expresses the EU's ambition to become a more reliable security provider and capable defense actor in international level, underlines the fact that NATO remains the cornerstone of the European defense, emphasizes on investing massively in defense, integrating innovation, and take collective action in order to overcome the

capability and industrial gaps in addition to several increased strategic dependencies. One of the most concerning conclusions of the EDIS is that:

*“[...] 78% of the Defense acquisitions by EU Member States between the start of Russia’s war of aggression and June 2023 were made from outside the EU, with the US alone representing 63% [...].”*

The second subpart entitled *“Defense Readiness requires a strong, responsive and innovative EDTIB”* highlights the importance of creating a responsive and competitive EDTIB focusing on innovation and resilience to external shocks and disruptions through public and private investments, also stressing that there has been a defense underinvestment during the past.

The third subpart entitled *“Too little cooperative investment in the EU keeps the EDTIB punching below its weight”* underlines that member-states do not cooperate as much as they should in the defense and security field, having as a result a scattered EDTIB that is further weakened by the lack of cooperation – as far as the demand, supply and acquisition sides are concerned – and the reliance on third countries.

The fourth subpart entitled *“Helping Ukraine withstand the Russian aggression: a decisive Union contribution, but strong potential for improvement”* stresses EU’s quick response in supporting Ukraine through the European Defense Agency (EDA), the European Peace Facility (EPF), the three-track ammunition initiative<sup>14</sup>, the European Defense Industry Reinforcement through common Procurement Act (EDIRPA)<sup>15</sup> and the Act in Support of Ammunition Production (ASAP)<sup>16</sup>.

The fifth subpart entitled *“From emergency responses to readiness: time for a paradigm shift”* highlights the need to secure the availability of the necessary volumes of consumables for its member-states and Ukraine through European investments in new

<sup>14</sup> Council of the European Union. *Delivery and joint procurement of ammunition for Ukraine* [Outcome of proceedings]. 20 March 2023. <https://data.consilium.europa.eu/doc/document/ST-7632-2023-INIT/en/pdf> (21/03/2024).

<sup>15</sup> Official Journal of the European Union. *2023/2418 Regulation (EU) 2023/2418 of the European Parliament and of the Council of 18 October 2023 on Establishing an Instrument for the Reinforcement of the European Defence Industry Through Common Procurement (EDIRPA)* [Official Document]. 26 October 2023. <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32023R2418> (21/03/2024).

<sup>16</sup> European Commission. *“The Act in Support of Ammunition Production (ASAP) at a glance”*. *Defence Industry and Space*. No date. [https://defence-industry-space.ec.europa.eu/eu-defence-industry/asap-boosting-defence-production\\_en](https://defence-industry-space.ec.europa.eu/eu-defence-industry/asap-boosting-defence-production_en) (21/03/2024).

capacities, minimizing the EU external dependencies, engaging the public and private sector, proposing a Regulation in order to establish EDIP (Annex C)<sup>17</sup>, and introducing several measures as follows:

- ✓ Support of the EU Defense industrial readiness, based on an increased coordination of Member States' defense needs,
- ✓ Strengthen the EDTIB to produce more while ensuring its security of supply,
- ✓ Develop the financial means to underpin EU defense industrial readiness,
- ✓ Mainstream a defense industrial readiness culture, and
- ✓ Work effectively with partners.

#### 4.3 More, Better, Collaborative and European Investment

EDIS's third part, "*Leveraging Readiness through investment: More, Better, Together, European*" (pages 7-16), is divided into three subparts.

The first subpart entitled "*Investing better*" begins by stating that its headline "[...] means targeting investments where it matters the most, avoiding duplication and increasing efficiency" and is further divided in to two sections.

The first section, "*A new joint programming and procurement function*", refers to the establishment of a Defense Industrial Readiness Board (DIRB) consisting of representatives of member-states<sup>18</sup>, the High Representative of the Union for Foreign Affairs and Security Policy/Vice-President of the Commission (HR/VP) and the Commission, in order to support member-states' procurement planning and provide strategic guidance, and a European Defense Industry Group (EDIG) in order to facilitate cooperation between the member-states' governments and the industry.

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<sup>17</sup> European Commission. "The European Defence Industry Programme at a glance." *Defence Industry and Space*. No date. [https://defence-industry-space.ec.europa.eu/eu-defence-industry/edip-future-defence\\_en#:~:text=at%20a%20glance-,EDIP%20is%20a%20Regulation%20proposed%20by%20the%20Commission%20to%20start,over%20the%20period%202025%2D2027](https://defence-industry-space.ec.europa.eu/eu-defence-industry/edip-future-defence_en#:~:text=at%20a%20glance-,EDIP%20is%20a%20Regulation%20proposed%20by%20the%20Commission%20to%20start,over%20the%20period%202025%2D2027) (21/03/2024).

<sup>18</sup> The detailed composition of the Board will be established within the EDIP Regulation.

The second section, “*From strategic programming to Projects of common interest,*” stresses that the main function of the aforementioned board will be the joint identification of possible Projects of Common Interest (PCI) utilizing several EU tools such as the Capability Development Plan (CDP), the Coordinated Annual Review on Defense (CARD) and the Permanent Structured Cooperation (PESCO). It also defines that the EU should have developed by 2035 special projects tailored to the European needs, related to air and missile defense, as well as space and cyber domains.

The second subpart entitled “*Investing together*” is further divided in to three sections.

The first section, “*Common procurement as the norm whenever relevant: expanding the intervention logic developed under EDIRPA,*” refers to the intent of expanding the EDIRPA intervention logic in order to offset financial costs for member-states, the measurement of progress in the field of Defense demand, also setting as a goal to procure at least 40% of defense equipment in a collaborative manner by 2030.

The second section, “*Acting more systematically in support of interoperability and interchangeability*”, stresses that in order to defragment the defense market the EU member-states must:

- ✓ Define common requirements,
- ✓ Use existing standards or generate new ones, and
- ✓ Mutually recognize certifications.

To this end, the EU Commission will promote the use of agreed civil or defense standards, such as NATO Standardization Agreements (STANAGs) and support swift cross-certification activities.

The third section, “*Towards robust cooperative full life cycle armament programmes: the Structure for European Armament Programme as a new powerful tool,*” underlines that the Structure for European Armament Programme (SEAP) is a new legal framework that – in addition to European Defense Fund (EDF) and PESCO–will help member-states to overcome delays and cost overruns through standardized procedures and supporting the development of prototypes. Moreover, the EU will increase the member-

states' funding rate in the context of EDIP and provide VAT exemption and bonus in certain occasions.

The third subpart entitled “*Investing European*” highlights the importance of availability in time and in volume and the need for de-dependence from third states, setting as a goal the value of intra-EU defense trade to represent at least 35% of the value of the EU Defense market by 2030 and 50% of the defense investments of member-states to be procured within the EU by 2030 and 60% by 2025. Finally, one of the most important decisions is the EU’s intent to create a European Military Sales Mechanism comprising of the following four pillars:

- ✓ A catalogue of Defense products,
- ✓ Financial support for the creation of pools of defense capabilities being quickly available,
- ✓ Provisions to ease procurement processes, and
- ✓ Capacity building measures for procurement agents.

#### 4.4 **Securing Availability**

Its fourth part, “*Securing availability: A responsive EDTIB under any circumstances and time horizon*” (pages 16-23), is divided into three subparts.

The first subpart entitled “*Supporting a more rapid response and versatile adaptation to urgent needs*” highlights the need to take more risks in order to deliver what is needed, expand the intervention logic of the ASAP beyond ground-to-ground ammunition and missiles, develop ‘ever-warm’ facilities, repurpose civilian production lines in order to support ramp-up, and create a Fund to Accelerate Defense Supply Chain Transformation (FAST) in order to financially support SMEs.

The second subpart entitled “*Pursuing the technological forefront on Defense*” is further divided in to two sections.

The first section, “*Support Innovation and Realise the Defense Potential of SMEs*,” stresses the need to take advantage of civil innovation cycles that are faster in order to maintain competitiveness as far as dual-use technologies are concerned and to



promote research through funding civil enterprises, and refers to the 2,000,000,000€ EU Defense Innovation Scheme (EUDIS), Hub for EU Defense Innovation (HEDI), the EU Innovation Office in Kyiv and the Defense Equity Facility that have been developed to support innovation.

The second section, “*Help EDF projects become a tangible reality beyond the R&D phase,*” highlights that there is a ‘commercialization gap’ at the prototyping stage of research and development (R&D) which might lead many companies to terminate their operation once funding is over, a scenario that will be addressed through sustained support towards industrialization and repayable grants for respective actions.

The third subpart entitled “*Ensuring Security of Supply at the EU level*” is further divided in to three sections.

The first section, “*Greater security of supply to maximise the Defense potential of the internal market*”, refers to a proposed set of measures – such as the identification and monitoring of critical Defense products – taken under the EU Security of Supply regime that will mainly address supply crises caused either by shortages of components or raw materials, or a security crisis within or outside the EU.

The second section, “*Enabling and de-risking strategic stockpiling,*” refers to the EU intention to fund the stockpiling of basic components by industry in order to be able to better response to increased demand during crises.

The third section, “*Identifying upfront and addressing the most strategic dependencies,*” underlines the negative impact of certain excessive dependencies also referring to the EU’s efforts to identify and mitigate them through the EU Observatory of Critical Technologies and cross-fertilization between EU instruments’ work programs.

#### **4.5 Financing Defense Industrial Readiness**

EDIS’s fifth part “*Financing the Union’s ambition for Defense industrial readiness*” (pages 23-24) refers to the required financial means necessary for implementing the EDIS, consisting of a 1,500,000,000 € budget in addition to complementary amounts for the development and integration of the Ukrainian DTIB with the respective European one using the windfall profits of frozen Russian assets. It also emphasizes on the need to

increase the next Multi-Annual Financial Framework (MFF) and future large-scale joint defense procurements.

#### 4.6 Mainstreaming a Defense Readiness Culture

Its sixth part, “*Mainstreaming a Defense readiness culture, including across EU policies*” (pages 24-28), aims to highlight the relation between the defense industry and resilience, security and social sustainability, and is divided in three subparts.

The first subpart entitled “*Facilitating access to finance*” is further divided into three sections.

The first section, “*Access to private finance,*” refers to the need to facilitate private investments in the Defense sector through high-level dialogue with banks and investors, as they have been relatively low mainly due to the complexity of procurement procedures.

The second section, “*Taking full benefit of existing horizontal EU financial instruments*”, stresses that the developed EU financial instruments are not being fully exploited due to the European Investment Bank (EIB) lending policies, thus modifying them is a major priority for the EU.

The third section, “*Full integration of Defence and security as a strategic objective of relevant Union funding and programmes,*” underlines that the EDTIB is closely related to the technological and industrial development – thus can benefit from several EU funds that are related to the latter – also stating that defense readiness, security and resilience must be defined as an explicit strategic objective.

The second subpart entitled “*Ensuring that the EDTIB operates in an adequate regulatory environment*” highlights the need to mainstream defense considerations in EU policies and review the financial regulations in order to support defense readiness.

The third subpart entitled “*Improving the attractiveness of the defense sector for the young generations and the most talented*” stresses the need to invest in the human factor through a specific Action Plan – as the contemporary defense industry is characterized by a labor and skills shortage – and improve workforce mobility and defense-related education.

The fourth subpart entitled “*Helping the EDTIB to contribute to the green transition*” underlines that the EU is taking action to support the Armed Forces’ green transition, mainly through the Joint Communication on a New Outlook on the Climate and Security Nexus,<sup>19</sup> also highlighting the Defense industry’s role in climate adaptation.

#### 4.7 Readiness and Resilience Through Partnerships

EDIS’s seventh part, “*Achieving readiness and resilience through partnerships*” (pages 28-31), is divided in three subparts.

The first subpart entitled “*Developing ever closer ties with Ukraine*” underlines the fact that Ukraine is a crucial partner for the EU and that the Ukrainian DTIB can benefit from cooperation with the EDTIB and vice versa. Moreover, it defines that in order to enhance the cooperation of Ukraine and the EU, the HR/VP and the EU Commission must take the following measures:

- ✓ Participation in Union program in support of defense industry, as far as joint procurement and support to the Ukrainian ramp-up are concerned,
- ✓ Stimulating cooperation between the Ukrainian DTIB and the EDTIB, through arrangements with EDA, information exchange with EEAS, funding from EPF, the hosting of a EU-Ukraine Defense Industry Forum, and
- ✓ Further support to Ukraine through the EDTIB, in matters related to procurement, funding and capacity building.

The second subpart entitled “*NATO*” stresses the need for closer cooperation between EU and NATO through information exchange, establishment of synergies, cooperation between EU and NATO agencies – such as NATO Support and Procurement Agency (NSPA) and Defense Innovation Accelerator for the North Atlantic (DIANA) – and supply chain support, especially in the following fields:

- ✓ Circular economy,
- ✓ Interoperability,

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<sup>19</sup> European Commission. *Joint Communication to the European Parliament and the Council A New Outlook on the Climate and Security Nexus: Addressing the Impact of Climate Change and Environmental Degradation on Peace, Security and Defence* [Official Document]. 28 June 2023. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52023JC0019> (21/03/2024).

- ✓ Industry aspects of climate change,
- ✓ Standardization cross-certification, and
- ✓ Responses to new and emerging threats.

The third subpart entitled “*Teaming-up with strategic and international partners to achieve Defense readiness*” highlights the supply chains’ complexity caused by globalization, which leads to the necessity of a flexible cooperation with like-minded actors in areas of common interest, in order to maintain defense industrial readiness and at the same time reduce the EU’s strategic dependencies.

#### 4.8 Conclusion

Its eighth part, “*Conclusion*” (page 31), highlights the need for powering up the EU defense industry in order to tackle the contemporary security threats and challenges, the importance of the availability of defense equipment in order to guarantee the effectiveness of the armed forces, the need for creating an integrated defense market, the fact that the EDIS will facilitate the EU’s responsiveness without scarifying the future also serving as a catalyst in the restoration and preservation of peace in the European continent, and finally the priority that has to be given to the adaptation of the EU’s defense industry to the contemporary security and market conditions.

### 5. Analysis and Assessment

First of all, as far as the basic elements of strategy are concerned, it can be stated that EDIS clearly defines the current situation of the EUDI (capabilities, weak points and trends) which is described in the EDIS Factsheet (Annex B) in the paragraph entitled ‘WHERE DO WE STAND?’ as following:

*“The EDTIB is a competitive global player capable of producing world-class advanced systems. But its full potential is affected by years of underinvestment and fragmentation of Defense demand along national lines. These trends have increased dependencies on third countries.”*

As far as the ends of EDIS are concerned, its overall goal – defined in the paragraph entitled ‘WHAT?’ (Annex B)– is to “[...] *to strengthen the competitiveness and readiness of the European Defense Technological and Industrial Base (EDTIB),*” while the paragraph ‘WHERE DO WE WANT TO GO?’ defines the following four time-specific goals (benchmarks):

- ✓ The value of intra-EU Defense trade should represent at least 35% of the value of the EU Defense market by 2030,
- ✓ Member-states should devote at least 50% of their Defense procurement budget to procurement from the EDTIB by 2030,
- ✓ Member-states should devote at least 60% of their Defense procurement budget to procurement from the EDTIB by 2035, and
- ✓ Member States should procure at least 40% of Defense equipment in a collaborative manner by 2030.

As far as the means are concerned, the paragraph entitled ‘HOW DO WE GET THERE?’ (Annex B) of the EDIS Factsheet defines several administrative, financial and organizational tools –such as the DIRB and the high-level EDIG, SEAP, FAST, EDIP, CDP, CARD, PESCO, etc.– and the following ways:

- ✓ Procurement support,
- ✓ Support for research and innovation,
- ✓ Promotion of a Defense readiness culture,
- ✓ Establishing and enhancing partnerships, and
- ✓ Financial support.

Second of all, it must be highlighted that EDIS contains a large number of references underline NATO’s vital role regarding the European defense. By this it is assessed that the EU wants to make sure that the enhancement of its defense capacity will not be seen as an effort to overrule NATO form the European defense architecture. Moreover, the document stresses that the EU member-states’ defense and the protection of their citizens are national

responsibilities, thus the member-state's sovereignty is not affected by the provisions of the EDIS. This is also an important matter related to the EU's defense and security, as several states have expressed their contradiction to several defense initiatives in the past, due to sovereignty issues<sup>20</sup>.

Moreover, the fact that EDIS emphasizes on supporting Ukraine through several means and ways – despite the fact that Ukraine is not (yet) a EU member-state – is of no surprise, as the war between Russia and Ukraine has been transformed into a war between West and East, not only due to its ideological aspect, but also due to the fact that a Russian victory might lead to several other conflicts that will further deteriorate regional peace and security.

Taking into consideration the situation of the EUDI reported in EDIS, it is understood that the issuance of a Strategy regarding the EUDI was needed in order to provide the necessary framework for its member-states in order to facilitate their cooperation in the security and defense sector. It must be stressed though that several long-lasting issues such as interoperability, were not the result of the complex procurement procedures but of the different needs of the EU member-states, as a large majority of the Defense means depend on the member-states' terrain and weather conditions that differ significantly. In addition to that, national defense spending depend on each nation's bilateral relations with other actors that – despite the EU CFSP – also differ significantly, which means that the EU must closely supervise the implementation of EDIS in order to meet its set goals.

Nevertheless, the establishment of DIRB in order to support member-states' procurement planning and provide strategic guidance, EUDIG in order to facilitate cooperation between the member-states' governments and the industry, standardization cross-certification and most notably the creation of a European Military Sales Mechanism is estimated that will most probably boost the cooperation between member-states, especially as far as PESCO is concerned, leading to the reduction of unemployment and the enhancement of the EU's strategic autonomy in several fields besides security and defense.

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<sup>20</sup> European Parliament. *Draft Treaty Establishing a Constitution for Europe* (not ratified) [Official Document]. No date. <https://www.europarl.europa.eu/about-parliament/en/in-the-past/the-parliament-and-the-treaties/draft-treaty-establishing-a-constitution-for-europe> (21/03/2024).

Creating a defense readiness culture though, is probably the most difficult goal set in the EDIS. For states like Greece that has been facing the aggressive behavior of its neighboring Türkiye for the past 50 years, defense readiness has been a vital factor for maintaining its territorial integrity. Unfortunately, this is not the case – at least until Russia’s invasion of Ukraine – for other European states have not been facing major external threats, a fact reflected in their defense expenditures which is below the minimum 2% of their GDP set by NATO (Annex D).

The defined capacity of resilience is also crucial not only for the EU but for every actor as well, as it allows it to successfully address existing and emerging threats of the security environment and seize opportunities to quickly recover from crises. This is highlighted by many regional and international actors in their respective strategic documents<sup>21</sup>, such as the 2022 National Security Strategy of the USA<sup>22</sup>, France’s 2022 National Strategic Review<sup>23</sup>, Japan’s 2022 National Security Strategy<sup>24</sup>, Russia’s 2023 Foreign Policy Concept<sup>25</sup>, the 2023 Integrated Review Refresh of the UK<sup>26</sup>, and Germany’s 2023 National Security Strategy<sup>27</sup>.

<sup>21</sup> Koukakis Georgios. *Resilience: Highlighting its Importance for Security and Development through References to (National) Security Strategic Documents of International Actors*. HAPSc Policy Briefs Series 4(1). 29 June 2023. 77–87. <https://doi.org/10.12681/hapscpbs.35186> (12/03/2024).

<sup>22</sup> Koukakis Georgios. *The National Security Strategy of the USA: Background, Recent Developments and Future Considerations Regarding the International Security Environment*. HAPSc Policy Briefs Series 3(2). 29 December 2022. 122–132. <https://doi.org/10.12681/hapscpbs.33792> (12/03/2024).

<sup>23</sup> Κουκάκης Γεώργιος. *Η νέα Εθνική Στρατηγική Αναθεώρηση της Γαλλίας: Οι προκλήσεις ασφάλειας, οι στρατηγικοί στόχοι, και η εκτιμώμενη αντίδραση των περιφερειακών και διεθνών δρώντων* [France's new National Strategic Review: Security challenges, strategic objectives, and the estimated response of regional and international actors]. Foreign Affairs The Hellenic Edition, 12 December 2022. <https://www.foreignaffairs.gr/articles/73942/georgios-koykakis/i-nea-ethniki-stratigiki-anatheorisi-tis-gallias> (12/03/2024).

<sup>24</sup> Κουκάκης Γεώργιος. *Η νέα Στρατηγική Εθνικής Ασφάλειας της Ιαπωνίας: Ο ρόλος που καλείται να διαδραματίσει στον Ινδο-Ειρηνικό, η στήριξη των ΗΠΑ και η εκτιμώμενη αντίδραση της Κίνας* [Japan's new National Security Strategy: The role it is called upon to play in the Indo-Pacific, US support and China's estimated reaction]. Foreign Affairs The Hellenic Edition, 23 December 2022. <https://www.foreignaffairs.gr/articles/73958/georgios-koykakis/i-nea-stratigiki-ethnikis-asfaleias-tis-iaponias> (12/03/2024).

<sup>25</sup> Κουκάκης Γεώργιος. *Πώς βλέπει η Μόσχα τον κόσμο: Το νέο δόγμα της εξωτερικής πολιτικής της Ρωσίας* [How Moscow sees the world: Russia's new foreign policy doctrine]. Foreign Affairs The Hellenic Edition, 10 April 2023. <https://www.foreignaffairs.gr/articles/74100/georgios-koykakis/pos-blepei-i-mosxa-ton-kosmo> (12/03/2024).

<sup>26</sup> Κουκάκης Γεώργιος. *Η στρατηγική εθνικής ασφάλειας και διεθνούς πολιτικής του Λονδίνου: Πώς βλέπει το Ηνωμένο Βασίλειο τις μεταβολές στο διεθνές περιβάλλον* [London's national security and international policy strategy: How the UK views changes in the international environment]. Foreign Affairs The Hellenic Edition, 15 May 2023. <https://www.foreignaffairs.gr/articles/74157/georgios-koykakis/i-stratigiki-ethnikis-asfaleias-kai-diethnoys-politikis-toy-lond> (12/03/2024).

<sup>27</sup> Κουκάκης Γεώργιος. *Η πρώτη «ιστορική» Στρατηγική Εθνικής Ασφάλειας της Γερμανίας: Πώς βλέπει το Βερολίνο τον εαυτό του στον 21ο αιώνα και τι σημαίνει αυτό για τον κόσμο και την Ελλάδα* [Germany's first "historic" National Security Strategy: How Berlin sees itself in the 21st century and what it means for the

A very important parameter that must also be highlighted is the fact EDIS addresses a major security and defense challenge that has not been comprehended enough by some policy makers, which is the Armed Forces' adaptation to climate change in accordance with green transition. Investments in research and innovation provided by EDIS are necessary in this procedure, as a big part of the aforementioned adaptation is closely related to the transformation of vehicles, weapons and systems so they can consume renewable sources of energy, in order to mitigate their impact on climate change. In fact, climate change's impact on security has been underlined by NATO in several documents, such as the latest "*NATO Climate Change and Security Impact Assessment*."<sup>28</sup>

Despite the fact that EDIS provides several opportunities for the EU member-states to boost their economies through cooperation in the defense sector, it must be stressed that it will not deliver the desired results unless member-states align their national policies in accordance with the provisions of EDIS. Some of the additional national measures that can facilitate this effort may include the provision of financial motives for individual and/or companies in order to avoid brain drain, promotion of the opportunities provided by EDIS for young people through media and educational programs, and tax reliefs in order to further support a shift to the defense sector.

The increased EU support to Ukraine – such as the Innovation Office that the EU is planning to open in Kyiv – is assessed that might have geopolitical consequences, as it will most probably be seen by Russia as a hostile action that will further worsen its relations with the EU. It must also be noted that the EU has taken a variety of measures against Russia – such as the imposition of sanctions<sup>29</sup>, the establishment of a EUTM Ukraine<sup>30</sup>, the signing of an energy deal with Egypt and Israel<sup>31</sup>, Ukraine's provision with ammunition

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world and Greece]. Foreign Affairs The Hellenic Edition, 18 June 2023. <https://www.foreignaffairs.gr/articles/74201/georgios-koykakis/i-proti-%C2%ABistoriki%C2%BB-stratigiki-ethnikis-asfaleias-tis-germanias> (12/03/2024).

<sup>28</sup> North Atlantic Treaty Organization. *NATO Climate Change and Security Impact Assessment* (2<sup>nd</sup> Edition) [Official Document]. 2023. [https://www.nato.int/nato\\_static\\_fl2014/assets/pdf/2023/7/pdf/230711-climate-security-impact.pdf](https://www.nato.int/nato_static_fl2014/assets/pdf/2023/7/pdf/230711-climate-security-impact.pdf) (19/03/2024).

<sup>29</sup> Κουκάκης Γεώργιος. *Οι κυρώσεις ως συντελεστές ισχύος ενός κράτους ή οργανισμού* [Sanctions as a factor of power of a state or organization]. Center for International Strategic Analysis (KEDISA). 07 April 2023. <https://www.doi.org/10.13140/RG.2.2.14122.08648> (21/03/2024).

<sup>30</sup> Κουκάκης Γεώργιος. *How the war in Ukraine is changing the European security environment: European Union's new CSDP mission in Ukraine*. Center for International Strategic Analysis (KEDISA). 29 November 2022. <https://www.doi.org/10.13140/RG.2.2.10715.44329> (21/03/2024).

<sup>31</sup> Koukakis Georgios. *The trilateral partnership between Greece, Cyprus & Israel: Background, recent developments and future considerations regarding the security environment in the Eastern Mediterranean*. Hellenic Institute of Strategic Studies (HELISS). 13 November 2022, p. 8. <https://www.doi.org/10.13140/RG.2.2.24533.29927> (21/03/2024).



and defense systems, also characterizing Russia in the 2022 Strategic Compass as the most significant threat for the European Security<sup>32</sup> - while the French President's statements on February 26<sup>th</sup>, 2024 regarding the possibility of sending European troops in Ukraine caused Russia's reaction, as President Putin stated on February 29<sup>th</sup>, 2024 that Russia will do anything to win the war in Ukraine, also stressing that the Russian strategic nuclear forces are on full combat alert and ready to be used<sup>33</sup>.

As far as Greece is concerned, despite the fact that its Defense expenditures exceed the 2% limit defined by NATO, the Hellenic Defense Industry is underdeveloped having as a result Greece's dependency on other actors. This situation was recently highlighted by the Greek Minister of National Defense, Nikos Dendias, during his interview in the Greek newspaper "Η ΚΑΘΗΜΕΡΙΝΗ" on January 14<sup>th</sup>, 2024 stating that:

*"[...] Our intention is to create an ecosystem completely different from what has existed until now. Because, let's be serious, what have we got so far? Two seriously troubled state-owned enterprises, Hellenic Aerospace Industry and Hellenic Defense Systems, and zero or almost zero domestic production. This cannot be tolerated in the 21<sup>st</sup> century in a country that spends so much money to serve the needs of the Armed Forces related to weapons systems [...]."*<sup>34</sup>

On December 30<sup>th</sup>, 2023 the Greek Minister of National Defense had also characterized 2024 as a "year of transformation for the Greek defense industry,"<sup>35</sup> while on February 20<sup>th</sup>, 2024 he delivered a speech during the briefing of the 'Standing Committee on National Defense and Foreign Affairs of the Parliament' expressing his intention on

<sup>32</sup> Κουκάκης Γεώργιος, *Προς τα που δείχνει η Στρατηγική Πυξίδα της Ευρωπαϊκής Ένωσης* [Where does the European Union's Strategic Compass point to?]. *ibid*.

<sup>33</sup> Κουκάκης Γεώργιος, *Είναι υπαρκτός ο κίνδυνος ενός πυρηνικού πολέμου;* [Is there a danger of a nuclear war?]. *Liberal*, 02 March 2024. <https://www.liberal.gr/diethni-themata/einai-yparktos-o-kindynos-enos-pyrinikoy-polemoy> (20/03/2024).

<sup>34</sup> Ελληνική Δημοκρατία. *Συνέντευξη ΥΕΘΑ Ν. Δένδια στην Εφημερίδα Καθημερινή της Κυριακής και στον δημοσιογράφο Βασίλη Νέδο* [Interview with the Minister of National Defence N. Dendias in the Kathimerini newspaper of Sunday and with the journalist Vassilis Nedos]. Υπουργείο Εθνικής Άμυνας. 14 January 2024. <https://www.mod.mil.gr/synenteyxi-yetha-n-dendia-stin-efimerida-kathimerini-tis-kyriakis-ston/> (20/03/2024).

<sup>35</sup> CNN Greece. *Δένδιας: Το 2024 έτος μετασχηματισμού για την ελληνική αμυντική βιομηχανία* [Dendias: The 2024 year of transformation for the Greek defense industry]. 30 December 2023. <https://www.cnn.gr/politiki/story/398615/dendias-to-2024-etos-metaximatismoy-gia-tin-elliniki-amyntiki-viomixania> (20/03/2024).

establishing a new ‘*Evolution, Innovation and Defense Technology*’ Branch in the Hellenic Armed Forces and a ‘*Hellenic Defense Innovation Center*’ aiming to promote research and innovation, with a focus on unmanned systems<sup>36</sup>. Moreover, on March 9<sup>th</sup>, 2024 he expressed his satisfaction regarding the issuance of EDIS, stating that it will facilitate the development of the Hellenic Defense Industry in addition to the implementation of the Greek ‘*Agenda 2030*’ which aims to develop defense technology programs in order to transform Greece from a ‘Defense customer’ to a ‘Defense producer’<sup>37</sup>.

## 6. Concluding Remarks

To sum up, it must be understood that due to the conditions of the contemporary security environment of polycrises and permacrises<sup>38</sup>, the effectiveness of the European security and defense is closely related to the establishment of a competitive and innovative DITB, a goal that can only be achieved through cooperation between the EU member-states, like-minded actors and the private sector. In order for this cooperation to be effective though, the partnering actors’ actions must be properly coordinated and the cooperation framework specifically defined in accordance with EDIS whose importance was also highlighted by HR/VP Josep Borrell, who stated that:

*“Russia’s brutal war of aggression against Ukraine has brought back high intensity warfare to Europe. After decades of under-spending, we must invest more on Defense, but we need to do it better and together. A strong, resilient, and competitive European Defense industry is a strategic imperative and a pre-condition to enhance our Defense readiness. We must also step up our military support to Ukraine, including by supporting its Defense industrial base. This Strategy marks a paradigm shift towards a Union that is*

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<sup>36</sup> Ελληνική Δημοκρατία. *Πρωτολογία Υπουργού Εθνικής Άμυνας Νίκου Δένδια κατά την ενημέρωση της Διαρκούς Επιτροπής Εθνικής Άμυνας και Εξωτερικών Υποθέσεων της Βουλής για θέματα αμυντικής πολιτικής* [Prologue by the Minister of National Defense Nikos Dendias during the briefing of the Standing Committee on National Defense and Foreign Affairs of the Parliament on defense policy issues]. Υπουργείο Εθνικής Άμυνας. 20 February 2024. <https://www.mod.mil.gr/protologia-yπουργoy-ethnikis-amynas-nikoy-dendia-tin-enimerosi-tis-diarkoyis/> (20/03/2024).

<sup>37</sup> The Power Game. Δένδιας: *Να επενδύσουμε στην ελληνική αμυντική τεχνολογία* [Dendias: To invest in Greek defense technology]. 09 March 2024. <https://www.powergame.gr/politiki/616998/dendias-na-ependysoume-stin-elliniki-amyntiki-technologia/> (20/03/2024).

<sup>38</sup> Koukakis Georgios. *Permacrises and Polycrises: Outlining the Contemporary Security Environment through References to Strategic Documents of Regional and International Actors*. HAPSc Policy Briefs Series 4(2). 31 December 2023, pp. 55–64. <https://doi.org/10.12681/hapscpbs.36661> (12/03/2024).

*a strong security and Defense actor and a better partner, in line with objectives of the Strategic Compass.”<sup>39</sup>*

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<sup>39</sup> European Commission. *First ever defence industrial strategy and a new defence industry programme to enhance Europe's readiness and security*. Ibid.

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Annex A The EU Factsheet About Strategic Compass

MARCH 2022  
#EUDefence  
#StrategicCompass




# STRATEGIC COMPASS

## A STRATEGIC COMPASS FOR SECURITY AND DEFENCE

The EU needs to become a stronger and more capable actor in security and defence: both to protect the security of its citizens and to act in crisis situations that affect the EU's values and interests. With the Strategic Compass, Member States agree on a common strategic vision for the EU's role in security and defence and commit to a set of concrete and wide-ranging objectives to achieve these goals in the coming 5-10 years.



**“Europe must learn to speak the language of power. Over the next decade, we will make a quantum leap to become a more assertive and decisive security provider, better prepared to tackle present and future threats and challenges.”**

**JOSEP BORRELL**  
High Representative of the Union for Foreign Affairs and Security Policy/  
Vice-President of the European Commission

### The world we face

A common strategic vision requires a common understanding of the threats and challenges the EU will face in the foreseeable future. The work on the Strategic Compass was therefore kicked-off in November 2020 with the EU's first-ever comprehensive threat analysis. In sum, it describes a European and global security landscape that is more volatile, complex and fragmented than ever due to multi-layered threats. This threat analysis will be regularly updated and developments since its finalisation, in particular the Russian military aggression against Ukraine, have been taken into account in the final Strategic Compass.

 <b>Global level</b>	 <b>Regional level</b>	 <b>Threats against the EU</b>
<p>Slowdown of globalisation, growing economic and political rivalry between global powers, climate change, competition for resources, instrumentalisation of irregular migration, and threats to the multilateral system.</p>	<p>Traditional military threats and armed aggression, destabilising interference/actions of state and non-state actors, conflict, state fragility, and inter-state tensions and external influences.</p>	<p>State and non-state actors targeting the EU with hybrid tools, including the misuse of disruptive technologies, cyber-attacks, disinformation, and other non-military sources of malign influence, and terrorism.</p>



**2** **A STRATEGIC COMPASS FOR THE EUROPEAN UNION**

## THE EU AS SECURITY PROVIDER, GLOBAL ACTOR AND PARTNER IN SECURITY AND DEFENCE

A united European commitment for a strong EU in security and defence is as crucial as ever. Building on a common sense of purpose and responsibility, the Strategic Compass specifies clear targets and milestones in four work strands:

**ACT**

- Up to 5,000 strong EU Rapid Deployment Capacity
- Live exercises on land and at sea
- Enhance Military Mobility
- Reinforce civilian and military CSDP missions and operations
- More rapid and flexible decision-making

**SECURE**

- Hybrid Toolbox and Response Teams
- Cyber Diplomatic Toolbox and Cyber Defence Policy
- Foreign Information Manipulation and Interference Toolbox
- EU Space Strategy for Security and Defence
- Coordinated Maritime Presences around the world



**INVEST**

- Spend more and better - defence spending and incentives for cooperation
- Strategic enablers and next generation capabilities
- Boost defence technological innovation to reduce strategic dependencies

**PARTNER**

- Strengthened strategic partnership with NATO and the UN
- Cooperation with regional partners (OSCE, AU, ASEAN)
- Strong bilateral partnerships
- Military assistance to partners through the European Peace Facility

 STRATEGIC COMPASS

Source: [https://www.eeas.europa.eu/sites/default/files/2022-03-21\\_strategic\\_compass.pdf](https://www.eeas.europa.eu/sites/default/files/2022-03-21_strategic_compass.pdf)

## Annex B The EU Factsheet about EDIS

 EUROPEAN UNION

# EDIS

## EUROPEAN DEFENCE INDUSTRIAL STRATEGY

### WHAT?

A European Defence Industrial Strategy (EDIS), to strengthen the competitiveness and readiness of the European Defence Technological and Industrial Base (EDTIB).

### WHY?

Following Russia's unprovoked invasion of Ukraine and the ensuing emergency responses, it is now time to move to structural EU defence readiness to better protect our citizens.

### WHERE DO WE STAND?

The EDTIB is a competitive global player capable of producing world-class advanced systems. But its full potential is affected by years of underinvestment and fragmentation of defence demand along national lines. These trends have increased dependencies on third countries.

### WHERE DO WE WANT TO GO?

EU Member States need the defence industry to be capable of producing more and faster. This will require more cooperation and collective action as Europeans. EDIS proposes several tangible indicators :

- ▶ By 2030, the **value of intra-EU defence trade** should represent at least 35% of the value of the EU defence market.
- ▶ By 2030, at least 50% of Member States defence procurement budget should be devoted to **procurement from the EDTIB**, and 60% by 2035.
- ▶ By 2030, Member States should procure at least 40% of defence equipment **in a collaborative manner**.



## HOW DO WE GET THERE?

### INVESTING MORE, BETTER, TOGETHER, EUROPEAN

- A new joint programming and procurement function, through the creation of a Defence Industrial Readiness Board, and a high-level European Defence Industry Group
- Financial support to EU Member States' cooperation in procurement from the EDTIB
- Structure for European Armament Programme (SEAP) facilitating EU Member States' defence cooperation
- Preparation for a European Military Sales Mechanism to enhance availability of EU equipment
- Launch of European Defence Projects of common Interest

### A RESPONSIVE AND INNOVATIVE EUROPEAN DEFENCE INDUSTRY

- Supporting investment in responsive production capacities
- Support the production of drones
- Finance for SMEs and Small Mid-Caps through the Fund to Accelerate Defence Supply Chain Transformation (FAST)
- EU Security of Supply regime to solve tensions along the supply chains and identify bottlenecks
- Continuous support for research into future-proof defence capabilities
- EU Defence Innovation Office in Kyiv

### MAINSTREAMING A DEFENCE READINESS CULTURE, INCLUDING ACROSS EU POLICIES

- Inviting the EIB Group to review its lending policies this year
- Promote defence industry across the financial sector.
- Consider including or maintaining defence readiness security and resilience as an explicit objective under future relevant EU programmes.

### TEAMING-UP WITH STRATEGIC, LIKE-MINDED AND INTERNATIONAL PARTNERS

- Promote Ukraine's participation in the Union's defence industry programmes
- EU-Ukraine Defence Industry Forum in 2024
- Enhance staff-to-staff structured dialogue with NATO

### FINANCING THE UNION'S AMBITION FOR DEFENCE INDUSTRIAL READINESS

- Proposed European Defence Industry Programme (EDIP) with a budget of €1.5 billion
- Discussion with Member States on the EU's financing needs in advance of the next MFF

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## Annex C The EU Factsheet About EDIP

European Commission

# EDIP

## EUROPEAN DEFENCE INDUSTRY PROGRAMME

The EDIP proposal is the first operational measure of the European Defence Industrial Strategy.

**EDIP WILL CONTRIBUTE TO ENHANCING EUROPE'S DEFENCE INDUSTRIAL READINESS BY:**

- ▶ Providing financial support with EUR 1.5 billion from the EU budget over the period 2025-2027. It may also be possible to use **windfall profits from frozen Russian assets to support Ukraine**
- ▶ Strengthening the **competitiveness, responsiveness and resilience** of the EU's Defence Technological and Industrial Base
- ▶ Fostering cooperation with Ukraine on the recovery, **reconstruction and modernisation** of its defence industry
- ▶ Providing a toolbox, and notably a **new legal structure** for EU Member States to facilitate cooperation across the whole life cycle of defence capabilities
- ▶ Ensuring the **availability and supply** of defence products on a steady basis, in time and in the requisite volumes.

Defence Industry and Space



**FINANCIAL SUPPORT TO BOOST INVESTMENT**

- Bridging the gap between recent emergency instruments and the next MFF
- EU grants to incentivise Member States cooperation on common procurement from the European defence industry
- EU grants to de-risk investment in the production capacities of the European defence industry
- Supporting the productisation and commercialisation of defence products developed in cooperation (e.g. the European Defence Fund)

**RECONSTRUCTING AND DEVELOPING UKRAINE DEFENCE INDUSTRY**

- Possibility to use the windfall profits of frozen Russian assets subject to Council decision on a proposal by High Representative
- Participation in EDIP open to Ukraine.
- Supporting cooperation with Ukrainian Defence industry
- Joint procurement with and for Ukraine

**STRUCTURE FOR EUROPEAN ARMA-MENT PROGRAMME (SEAP)**

- Open to EU Member States, Associated Countries and Ukraine
- Facilitating armament cooperation through
  - ▶ Dedicated EU funding.
  - ▶ Harmonised and simplified joint procurement rules.
  - ▶ VAT waiver in case of joint ownership through a SEAP.

**AN EU-WIDE SECURITY OF SUPPLY REGIME**

- Enhancing Security of Supply to address bottlenecks in critical supply chains
- A toolbox of crisis response measures adapted to the nature of the crisis
- Member States at the heart of the regime, with Council responsible for the activation

**A NEW DEFENCE INDUSTRIAL READINESS BOARD**

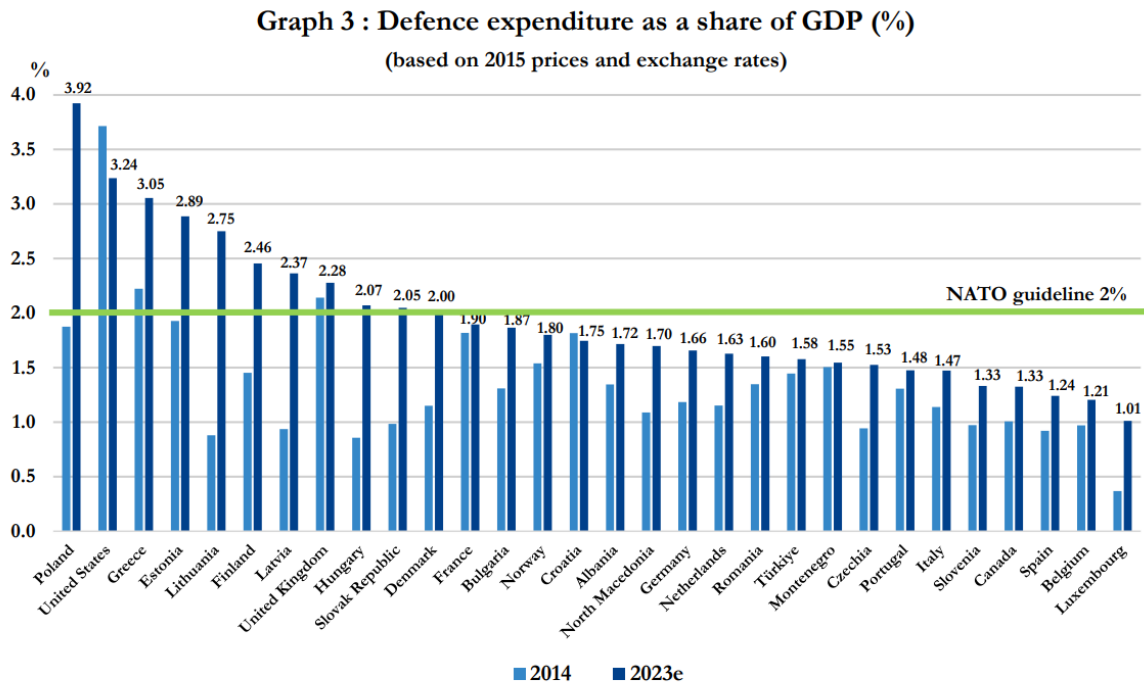
- Composed of the Commission, the High Representative/Head of the European Defence Agency and the Member States
- Providing strategic guidance and coherence in EU actions to increase defence industrial readiness
- Assisting and advising the Commission in the implementation of EDIP

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## Annex D NATO Members' Defense Expenditure (2014-2023)



Source: [https://www.nato.int/nato\\_static\\_fl2014/assets/pdf/2024/3/pdf/240314-def-exp-2023-en.pdf](https://www.nato.int/nato_static_fl2014/assets/pdf/2024/3/pdf/240314-def-exp-2023-en.pdf)