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Is the patient recovering?

This question was raised on 7 February at an expert roundtable discussion on “Ukrainian defence industry and its capabilities to meet the needs of the frontline” (2024), organised by the Media Centre of the Directorate General for Servicing Foreign Missions.

According to the panelists, Ukraine is in a phase of combined warfare, as it is no longer an old war, but not yet a new one. There was a critical situation with the supply of weapons, as the war had entered a long-term stage. In the context of a combined war, it is crucial to identify strategic steps to develop and support the defence sector. The war between Ukraine and Russia has acquired a global dimension, and therefore to win this war, it is necessary to develop new strategies and approaches aimed at developing the defence industry.

Russia has changed its war strategy, namely, it has begun actively targeting Ukrainian military enterprises. This problem needs to be addressed immediately. At the same time, there is a shortage of qualified personnel. Ukrainian companies are forced to re-establish ties with contractors, most of whom have either stopped production or are located in the former Soviet Union.

Why are we in such a difficult situation? Ukraine ignored cooperation with the Western defence industry and the modernisation of its own, while Russia, on the contrary, worked to modernise its own defence industry. This has led to the degradation of the technical capacity of the Armed Forces of Ukraine (AFU). As of 2024, 90% of the required weapons are supplied by the West. However, there is a possibility that military aid from Western partners will be suspended or reduced. Thus, there are two ways to solve the arms problem: to continue active cooperation with Western countries in the field of arms supply and to transition to full self-sufficiency. To start its own production, Ukraine needs components that it must order from Western manufacturers, which will increase the final cost of its products. There are two ways to increase the production of domestic weapons: the introduction of new technologies received on certain conditions from leading Western

companies or the use of remnants of old Soviet equipment.

Leaders of public and private enterprises understand that the Ukrainian military needs new, modern types of weapons and equipment to win. It is possible to withstand and win only with technological superiority, as Ukraine cannot gain an advantage in the number of troops. “This war will be won solely through technological superiority. This technological superiority means not only new ways of fighting, but also a completely different generation of weapons that Russia will be unable to provide on the required scale”, said Volodymyr Havrylov, Deputy Minister of Defence of Ukraine for 2022-2023. Ukraine needs to transition to modern technologies and introduce the latest tools of warfare. This will help to avoid a range of negative phenomena associated with the production of old, complex, and expensive systems of previous designs. “We need to reject all things Soviet... this is a window of opportunity”, says Vitalii Nemilostyvyi, Deputy Minister for Strategic Industries 2020-2021.

Private enterprises are the driving force behind Ukraine's technological development. Since 2018, the majority of defence products have been supplied by private enterprises, which are more active and creative. That is why the state should not apply complex procedures to inspect companies. This affects the rate of production and the trust of producers in the state. Therewith, the control procedures should be regulated depending on the products manufactured by the company. However, some types of products should be regulated exclusively by the state apparatus, as without this, the state will be unable to manage complex scientific and technological processes.

In modern environment, there is an increase in the number of private enterprises that are actively introducing technological innovations into production processes and products. The state's cooperation with these enterprises should solve the problem of arms supply. Through such cooperation, in the short term, it is necessary to establish the use of industrial capacities to ensure the ability of the Armed Forces to perform tasks on the battlefield.

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Medium- and long-term tasks should be based on creating guarantees for Ukraine's security. It is likely that assistance from Western partners will only come for a certain period of time, and therefore the task for Ukraine, according to experts, is to strengthen public-private partnerships that will provide a system of quality assurance for defence industry products. Quality management is the prerogative of the enterprise itself, but quality control is the responsibility of the ministry. Quality control will stay unchanged, but the state can simplify the bureaucratic procedure for accepting products and accelerate this process. This can be achieved through "integrity certificates", which NATO uses to provide to vetted businesses.

An equally important task is to establish permanent and sustainable communication between the military and the defence industry. It should be a single organism where everyone understands the concrete needs and how to meet them. This necessitates prompt and accurate budgeting, as companies need to be confident in the amount of investment and in meeting all the conditions for selling their products.

Another serious challenge facing the Ukrainian military-industrial complex is the lack of specialists, without whom it is impossible to achieve victory. The general education of Ukrainian citizens and their desire to contribute to the victory enables them to engage in cooperation in the production of drones and other equipment. This is the Ukrainian advantage in this war. Yaroslav Kalinin, Director of the LLC Infozahyst Research and Production Centre, noted that at the operational and strategic level, the state should take on the task of informing the professional community about the personnel needs of the military-industrial complex, whose enterprises can be considered as an alternative to military service. Qualified specialists need to understand where and how they can contribute to the victory.

At the state level, ministries should address the issue of protecting information on the location of defence companies and the list of orders they have received. All information is entered into a unified register, which becomes a target for enemy cyberattacks and a source of important classified information. "Prozorro ruined us" not only in the area of openness of information, but also in the specification and volume of state defence contracts. "Perhaps we should return to the paper format of document management", suggested Nemilostyvyi.

The deregulation of imports of ammunition and military equipment led to the fact that at the end of 2022, the state was unable to actively conduct offensive military operations. The delivery of military equipment is slowed down by certain laws in place in partner countries. International communication can help accelerate the delivery of military equipment. To obtain simplified regimes for the import of equipment, there must be transparent rules of the game. At the strategic level, the state, using all diplomatic efforts and regulatory policies, should pay attention to the processes of cooperation between Western defence businesses and Ukrainian state-owned or private companies. If Ukraine fails to attract foreign capital and fails to reach an agreement with local businesses, the country will face a collapse of the military-industrial complex and a loss of interest in rebuilding the country after the victory. In this regard, specialised committees and ministries

are needed to transfer and format the remnants of the Soviet-era military-industrial complex. There are private companies that can invest in abandoned workshops of the defence industry, but a range of rules prevent them from doing so, which do not allow them to accelerate investment. During the years of full-scale war, the number of defence enterprises has increased considerably, but the state needs to scale up the production of "small" weapons, including unmanned aerial vehicles. Ukraine already has the capacity to launch the enterprises, but with the understanding that the cost of damage from a missile potentially hitting its individual units should be several times less than the cost of the enemy missile itself.

There are several models for building or developing Ukraine's defence. One of them is based on an assessment of risks and threats. An effective method is to assess capabilities based on targets according to NATO standards. The state should reconsider its cooperation with the Alliance, since the only targets set were determined by cooperation in peacekeeping missions that are still in place but have not yet been adjusted to the conditions of war. "Ukraine is unique, as no other NATO country has experience in reforming in a time of war", said Deputy Head of the Mission of Ukraine to NATO for Defence Affairs 2016-2023 Serhii Mukusii.

"The anti-Western bloc is now outplaying the Western bloc. Pay attention not only to Russia, pay attention to China", Valentyn Badrak, Director of the Centre for Army, Conversion and Disarmament Studies, addressed the participants of the discussion. The latest Chinese-made anti-ship missiles, which were tested earlier this year, can completely cover the Yellow Sea. According to the expert, this is proof that China is demonstrating to the world its readiness to influence the balance of power not only in the Far East but also on a global scale.

Clearly, Ukraine needs new solutions that will allow it to stay ahead of the anti-Western bloc aimed at supplying Russia with weapons. The West can help Ukraine master the production of its own missiles or facilitate their purchase outside the EU and NATO. With the necessary weapons and equipment, the Ukrainian military will be able to launch an extremely effective counter-offensive in the medium term.

By far the most reliable option, as all the panelists agreed, is to rely on Ukraine's own capabilities and strength. That is why the experts suggested launching joint arms production for Ukraine outside Ukraine. This will help protect both highly skilled employees of defence companies and production facilities from targeted enemy attacks. The only obstacles to such plans are the existing unchanging rules of other countries, which require extremely lengthy procedures for various approvals. This problem can be solved through diplomatic efforts aimed at easing the procedural requirements for the development of military-technical cooperation with Ukraine by the governments of partner countries.

The roundtable discussion helped identify the key challenges and opportunities for the Ukrainian defence industry in the context of war in 2024. Achieving success in this area will require a comprehensive approach and active cooperation with various stakeholders, both nationally and internationally. Implementation of new strategies aimed

at modernising the defence industry, attracting international support and engaging the intellectual resources of

Ukrainian citizens and enterprises of various forms of ownership is critical to the success of the “recovery” process.

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