



DECEMBER 2025

Europe's Quest for Defence Readiness: Making Ukraine a 'Steel Porcupine'

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RESEARCH REPORT



FINABEL
THE EUROPEAN LAND FORCE
COMMANDERS ORGANISATION

Defence & Security Research Department

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RESEARCH REPORT

Introduction

As the Russo-Ukrainian conflict approaches its fifth year, Europe faces the mounting challenge of ensuring unwavering support to Kyiv while accelerating its own defence readiness. After the full-scale invasion, Ukraine signed security agreements with numerous allies. Although there is no obligation for signatories to send their troops to the battlefield, most partners have now committed maintaining the degree of support they have provided since 2022 (Soldatenko, 2024). European Commission President von der Leyen has set a bold agenda for her second term to achieve this objective, moving beyond mere political rhetoric. At the State of the Union Address delivered in September, she emphasised the need to ensure long-term security guarantees to Ukraine by improving its Qualitative Military Edge (QME) (European External Action Service [EEAS], 2025a). Accordingly, the Defence Readiness Roadmap released in October includes a dedicated initiative to “make Ukraine a ‘steel porcupine’” (European Commission, 2025a, p. 11) and deter future aggressions.

This paper examines what this effort should consist of in practice by illustrating the priorities the EU must address to strengthen Ukraine’s military capabilities. Given that any credible support requires reliable financial resources, this paper then assesses feasible funding options that the EU could leverage, including the release of Russian frozen assets. At the same time, Ukraine’s defence posture in the current hostilities is just as important for Europe’s own security. The creation of joint ventures between Ukrainian and European companies as part of the announced Drone Alliance (European Commission, 2025a) showcases how Member States can benefit from Kyiv’s battlefield experience and innovative ingenuity in countering the threats posed by Russia.

2. Ukraine’s Qualitative Military Edge: Which initiatives should the EU prioritise?

The Defence Readiness Roadmap describes harnessing Ukraine’s Qualitative Military Edge as a deliberate attempt to elevate Europe’s involvement in the Russo-Ukrainian conflict with measurable and targeted support (European Commission, 2025a, p. 11). The United States initially employed the concept of QME in support of Israel to compensate for the country’s smaller size and population relative to its adversaries (Sharp, 2025, p. 17) - a condition that applies to Ukraine too *vis-a-vis* Russia. US policymakers have established a detailed legal definition of QME that enables tracking progress and evaluating whether the standard is fulfilled: the “ability to counter and defeat any credible conventional military threat from any individual state or coalition of states [...] through the use of superior military means, possessed in sufficient quantity” (U.S. Congress, 2008, p. 5). The European Commission is attempting to mirror this approach, despite the challenges of calibrating aid during an ongoing war and the unstable contributions from the current United States administration.

While a programme detailing the specific strategy is under development, it is possible to single out two initiatives that should be addressed as a priority to bolster Ukraine’s QME:

- Improving training through EUMAM: The EU Military Assistance Mission (EUMAM) in support of Ukraine's Armed Forces was launched in October 2022 with an initial duration of two years and extended until November 2026 (Council of the EU, 2024). Taking place in facilities primarily located in Germany and Poland, EUMAM aims to provide comprehensive training at all levels of operational and leadership activities, ranging from demining to weapons maintenance and the preparation of battalions (EEAS, 2025b). It has so far fulfilled the wartime skills requirements of 80,000 soldiers and helped them leverage the effectiveness of Western assets in countering the Russian offensive (Jozwiak, 2025). In doing so, EUMAM also avoided excessive involvement of NATO in military support, mitigating the Kremlin's narrative of aggressive expansion by the Alliance (Ostanina, 2023, p. 3). Despite its success, EUMAM can be improved by addressing its shortcomings and adapting to the evolving realities of war. First, while the Mission primarily trains on military assets manufactured in Germany (Ostanina, 2023, p. 5), the EU countries have exported a variety of equipment to Ukraine from diverse sources, including five different models of battle tanks (Kump and Pauly, 2023, p. 28). This inconsistency hinders training efforts and could be partly alleviated by ensuring greater coordination and unified supervision of EU procurement frameworks and training programmes. Moreover, soldiers have noted that training provided at the tactical and strategic level is often decontextualised from the realities of the Ukrainian battlefield (Peck, 2023). To substantially harness the QME of Ukraine, European armies need to shift away from a doctrine of low-intensity warfare against insurgents or terrorists, because it is incompatible with a conventional war against an enemy state (Ostanina, 2023). Broadening the mandate of the Mission to train Ukrainian soldiers on their own soil, as recently proposed by EU High Representative Kaja Kallas (Tidey, 2025), would send a strong signal of unwavering support.
- Solving the ammunition problem: Protracted hostilities in the Russo-Ukrainian conflict have exposed a lack of preparedness by the West regarding ammunition production and stockpiles (Grand, 2023). Many believe this structural weakness is rooted in years of strategic miscalculations about the possibility of high-intensity warfare in Europe, which led policymakers to dismiss warnings by NATO officials about the capacity of production plants (Grey et al., 2024). Functioning artillery equipped with sufficient ammunition is essential for Ukraine to maintain control of the vast eastern front, but Ukraine's stockpile of Soviet-era artillery shells was depleted by the end of 2023 (Grey et al., 2024). In 2025, the EU aimed to deliver 2 million rounds of large-calibre ammunition (Bonini, 2025) but, considering that troops consume around 60,000 rounds per day (Baker, 2025), such contribution only fuels one month of resistance. In contrast, Moscow has swiftly pivoted to a wartime economy and retained a competitive advantage thanks to its close trade ties with China, India, and North Korea – major arms producers with large quantities of raw materials (Grey et al., 2024; Shin, 2024). Maintaining a QME over adversaries is impossible without guaranteed basic supplies; therefore, the EU should utilise the Coordinated Annual Review on Defence (CARD) to highlight this capability shortfall (European Commission, 2025a, p. 3) and encourage NATO allies to make long-term investments in expanded stockpiles. In parallel, it should design incentive schemes for manufacturers to increase ammunition production in the short term, similar to the policy approach adopted during the COVID-19 pandemic for vaccines (Grand, 2023). The new BraveTech EU initiative, which promotes strategic partnerships with Ukrainian start-ups

(Tessari, 2025), can be a valuable platform to explore innovative manufacturing solutions.

3. Which frameworks or financial instruments should the EU leverage?

A predictable, multi-year financing plan is paramount to sustain Europe's efforts to support Ukraine's military capabilities, whose budgetary needs are estimated at €130 billion over the next two years (Koranyi, 2025). The Commission's Roadmap mentions two instruments in this regard. The primary framework is the Security Action for Europe (SAFE) loan, launched in May 2025, to facilitate urgent investments by Member States with a focus on closing critical capability gaps in defence (European Commission, 2025b). Importantly, to stimulate European economies of scale, procurement contracts must ensure that no more than 35 per cent of component costs originate from outside the EU, the EEA, or Ukraine itself (European Commission, 2025b), thus signalling how the EU envisions defence readiness as both a public good and a shared responsibility, where Ukrainian firms are key contributors. Accordingly, the Roadmap proposes to track progress by monitoring, among other indicators, the proportion of SAFE loans allocated to projects involving Ukraine (European Commission, 2025a, p. 12).

SAFE provides opportunities for integrating Kyiv's defence industry within the European ecosystem, especially considering that neighbouring Member States Poland and Romania are the main beneficiaries of the instrument, receiving €43.73 billion and €16.68 billion, respectively (European Commission, 2025b). As both countries seek to replace Soviet-era infantry vehicles and modernise their military assets, the Polish government has advocated for the establishment of a consortium to stimulate joint procurement (Adamowski, 2025). The inclusion of Ukraine in joint acquisitions could bring some of the benefits associated with regional cooperation, including harnessing collective buying power, ensuring interoperable equipment, and improving bilateral relations (Cozma, 2025). These collaborative dynamics could incentivise broader cooperation between Central and Eastern European countries in response to Russia's destabilising attempts to extend its sphere of influence in the region. From the Ukrainian perspective, relying on 'near-shoring' its sources of military equipment and munitions to neighbouring allies would reduce logistical challenges and facilitate a more efficient transfer of know-how and technological capabilities (McClements, 2023).

Another mutually beneficial outcome could arise if Poland and Romania direct part of the SAFE investments beyond strict military needs to dual-use infrastructure projects, on the basis of their potential to play a leading role in the post-war reconstruction of Ukraine (Istrate, 2025). As the EU country sharing the longest border with Ukraine, the Romanian government holds a strong interest in a steady resolution of hostilities and has confirmed its intention to actively verify the enforcement of any ceasefire agreement (Veress, 2025, pp. 2-3). Poland and Romania can leverage their geographical proximity to intensify their commitment to reconstruction activities. Planned upgrades could include roads for better cross-border connectivity and industrial parks in border regions to sustain commercial flows (Istrate, 2025). Serving as a key logistical hub for all aid efforts would unlock improvements to the infrastructure network, thereby delivering the best possible support to a war-torn country.

SAFE recognises Ukraine's ongoing contribution to Europe's defence posture, however it does not ensure long-term security guarantees to Ukraine. For many beneficiary countries, these loans are essential to revitalise their own industrial base and retain access to state-of-the-art military assets for immediate protection within a context of growing political tensions (McMillan, 2025). Romania, which suffers from obsolescent technology and a lack of competitiveness from its state-owned defence company ROMARM, is a case in point (Soare, 2024, p. 7). So, while implementation of SAFE funds at the national level is promising in some respects, states may instead prioritise domestic revitalisation plans over possible dual-use initiatives that could benefit Ukraine. To ensure future collaboration, the EU must design complementary frameworks that emphasise the role of integrating Ukraine into infrastructure and development programmes. The second financial instrument mentioned by the Roadmap, the Ukraine Support Instrument (USI), partially addresses this by mobilising funds for direct investments to scale up Ukraine's defence industry and procure products originating in the country (European Commission, 2025a, p. 12). Nonetheless, as of 2025, only €300 million has been allocated to the USI (Štěpánek, 2025), which is unlikely to meet Kyiv's budgetary needs estimated at €130 billion without a consistent follow-up of the strategic industrial partnerships initiated by the instrument.

Amidst fiscal constraints faced by European governments and the steady disengagement of the US, securing sustainable financing for Ukraine in the short term stands as an immense challenge for the EU. President von der Leyen is therefore working on a reparation loan of up to €140 billion funded by the cash balances associated with the immobilised Russian assets, which are primarily held in the Belgian institution Euroclear (Koranyi, 2025). The release of the frozen funds is currently impeded by disagreements over legal guarantees, with Belgium insisting on a collective liability scheme to protect both itself and Euroclear from potential future lawsuits (Kolyandr, 2025). Additionally, some Member States have raised concerns over financial and reputational risks if other stakeholders deem European banks to be unreliable asset depositaries (Korolev, 2025). Beyond legal caution, however, these hesitations also reflect a realist recalibration and an increasing sense of fatigue regarding the war's trajectory. Several EU Member States fear that unlocking the frozen assets would further prolong the hostilities without substantially improving Ukraine's chances of winning on the battlefield and instead prefer to preserve the funds for greater bargaining power in post-war negotiations (Korolev, 2025). The European Commission must overcome this fatigue by framing the reparation loan as the most effective course of action, offering tangible benefits for the entire bloc. The following section explores a concrete example of how Ukraine's improved QME could bolster Europe's own readiness.

4. Mutual benefits: the Drone Alliance

The proliferation of Unmanned Aerial Vehicles (UAVs), commonly referred to as drones, in modern conflict is heavily testing the resolve and defence capabilities of both EU Member States and Ukraine, albeit under different conditions. From a European perspective, the threat of UAVs to national security has gained centre stage following recent unsettling airspace incursions across EU territory and NATO's eastern flank (Edwards, 2025). Despite Moscow's denials of responsibility, there is a growing consensus among European leaders that the incidents are part of Russia's hybrid campaign to unsettle citizens, instil division, and expose the lack of

preparedness by the Alliance in countering these unconventional threats (Hubenko, 2025). In September 2025, the response by the Polish military to suspected Russian drones made of plywood that had violated NATO airspace necessitated the use of expensive missiles and interceptors, highlighting a lack of cost-effective countermeasures (Edwards, 2025). These developments suggest that European arsenals are currently missing low-cost, rapidly deployable assets to credibly enforce deterrence against Russia's provocative strategy, which remains below the threshold of conventional conflict.

In contrast, the Ukrainian military has been forced to develop cheap yet sophisticated solutions to resist Russia's full-scale invasion, thus mastering tactical drone warfare from direct battlefield experience. Since the beginning of the conflict, when reconfigured civilian drones were deployed to offset a manpower disadvantage (Lopatin et al., 2025), Ukraine has scaled up production and fielded large quantities of first-person view UAVs for a variety of purposes – from intelligence gathering to highly disruptive strikes beyond the enemy's frontlines, (Zoldi, 2025) including the “Spider Web” operation conducted in June 2025 (Mazhulin et al., 2025). The European Commission recognises the added value of such practical experience and has announced a Drone Alliance with Ukraine as a flagship initiative of the Defence Readiness Roadmap (European Commission, 2025a). Beyond financial support, estimated at €2 billion (Hodunova, 2025), the Alliance can be seen as an essential component of Ukraine's QME. Most of the lessons learned and adaptations forged in war by Ukrainian troops have relied on informal networks, characterised by limited accountability and a lack of overarching guidance across units (Lopatin et al., 2025). The EU can assist with creating formalised communication networks, providing its expertise alongside dedicated institutions and processes, to 'systematise' innovation and ensure symmetrical information across the Ukrainian armed forces. Moreover, access to the European industrial base for manufacturing drone components allows Ukraine to retain a share of production capacity away from its own sites which are exposed to destructive attacks (Fiott, 2024), such as the Russian strike on the Malyshev plant in Kharkiv in 2022 (Ukrinform, 2022).

Most notably, the benefits of this partnership would not be solely limited to one side. Ukraine features over a hundred firms devising advanced UAV software and producing four million units annually, with the prospect of generating revenue through limited export to its allies (Briancon, 2025). Investments to integrate Kyiv's drone industry into the defence ecosystem of the EU would also enhance the latter's readiness due to the following:

- Tapping into civilian-led innovation: Drones are dual-use assets, and the ability to channel commercially available technologies (e.g. high-resolution cameras) into military applications has been at the core of Ukraine's innovative ingenuity (Lopatin et al., 2025). The EU can leverage the R&D efforts of the Ukrainian private sector to equip militaries with off-the-shelf commercial models that have been repurposed for defence.
- Developing counter-drone preparedness: Protecting troops and critical infrastructure from UAV attacks is a strategic priority on both sides of the Russo-Ukrainian conflict (Borsari and Davis, 2023). Considering how Moscow has threatened Europe's territory with drone incursions, the EU should

perfect measures to anticipate and neutralise hostile UAVs through Electronic Warfare (EW) systems that spoof GPS to mislead vehicles and jam their communication channels. Signals intelligence gathering (SIGINT) could reinforce the defence posture by capturing and decoding electronic signals to gain a strategic edge over adversarial intentions (Stoner, 2025).

- Implementing agile production and delivery: Ukrainian soldiers and engineers have excelled in shortening the feedback loop and design cycles to inform continuous improvements in drone configurations (Newton, 2025), thanks to frontline labs where UAVs are tested, repaired and modernised. The government has contributed to decentralising military procurement by granting unit commanders the ability to order necessary equipment independently (Kuzan, 2025). By creating joint ventures between European and Ukrainian companies, the former can learn from the approach of bringing together military forces, industry players, and the tech community to achieve greater manufacturing capacity. Arguably, it would be challenging to fully replicate this model across Europe, as such decentralised procurement would hinder the monitoring of the EU's stringent standards on anti-corruption, ESG governance, and sourcing requirements (Grossmann, 2025). Yet, as the Union has embarked on unprecedented spending to ramp up its industrial capacity, it must strive to deliver defence capabilities at scale and at speed to match the demands of a rapidly evolving security landscape.

Overall, for Europe, the Drone Alliance is not just about filling a capability gap. It stands as a litmus test for showcasing adaptation to the new paradigm of modern warfare, characterised by the proliferation of inexpensive unmanned platforms that strain existing defence systems (Jensen and Atalan, 2025, pp. 4-5).

5. Conclusion

As Europe confronts the enduring reality of Russia's aggression, transforming Ukraine into a 'steel porcupine' is both a strategic necessity and a catalyst for the EU's own defence readiness. This paper suggests that delivering on announced plans to harness Ukraine's QME requires prioritising two core areas: expanded and context-appropriate training under the EUMAM, and the steady provision of ammunition sustained by long-term industrial investments. The conflict has exposed EU's vulnerabilities in preparedness for an era of unmanned, high-intensity warfare. Initiatives like the Drone Alliance offer the opportunity to build a more resilient and agile industrial base through partnership with Ukraine. With respect to feasible financial mechanisms, SAFE loans provide an avenue for deeper integration of defence sectors at the regional level, yet the Ukraine Support Instrument and the prospective use of Russian frozen assets appear more effective alternatives in fuelling Kyiv's resistance with urgently required resources.

Overall, the relevance of these efforts for the security of Europe itself cannot be overstated. Amidst concerns that European leaders are being sidelined in current negotiations regarding the fate of Ukraine (Liboreiro, 2025), the EU must take responsibility for its interests and values and become fully involved in redesigning the continent's security architecture.

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