



Challenges and Enablers to Defense Industrial Cooperation

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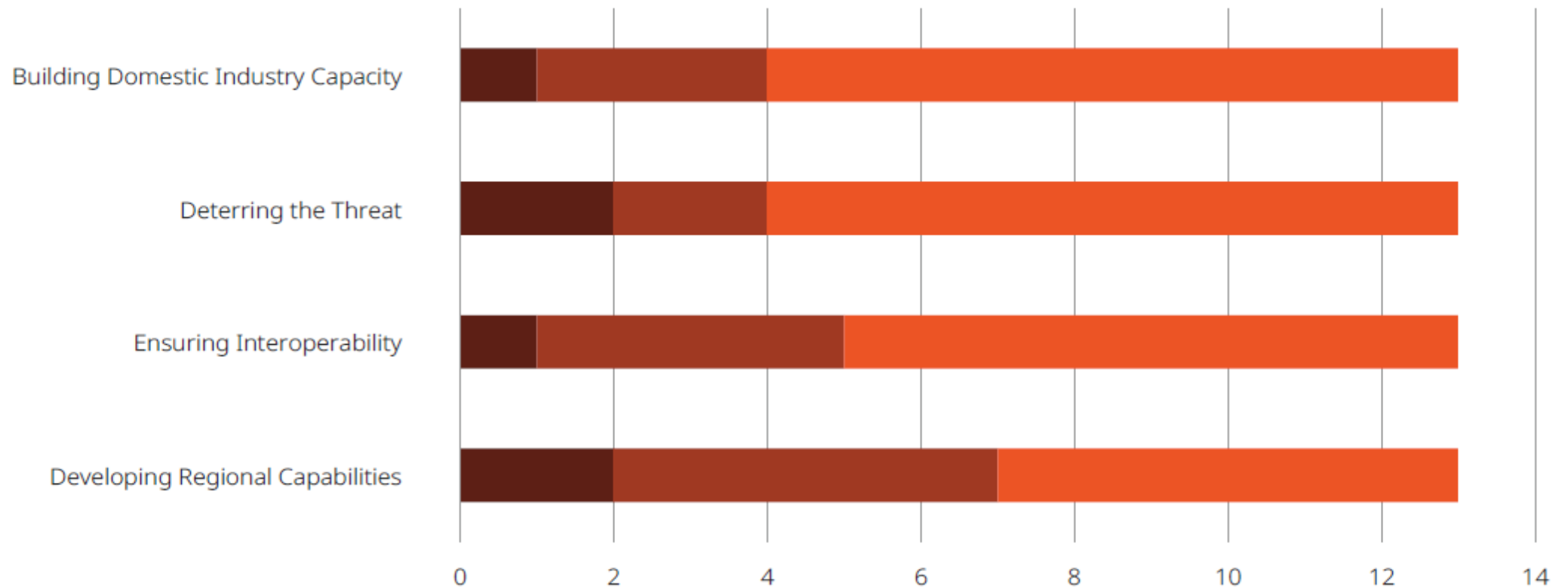
Project Overview

- CSIS examined the challenges and enablers to defense industrial cooperation between the United States and key allies and partners in the following categories:
 - Home country defense industrial priorities
 - U.S. export control and international acquisition processes
 - Home country export control and international acquisition processes
 - Defense cooperation agreements and programs
- CSIS surveyed the Defense MOU Attachés Group (DMAG) to gather data; 13 out of 27 nations responded (including one observer)

Nations have many reasons for engaging in defense industrial cooperation – with building domestic industry capacity being the most important

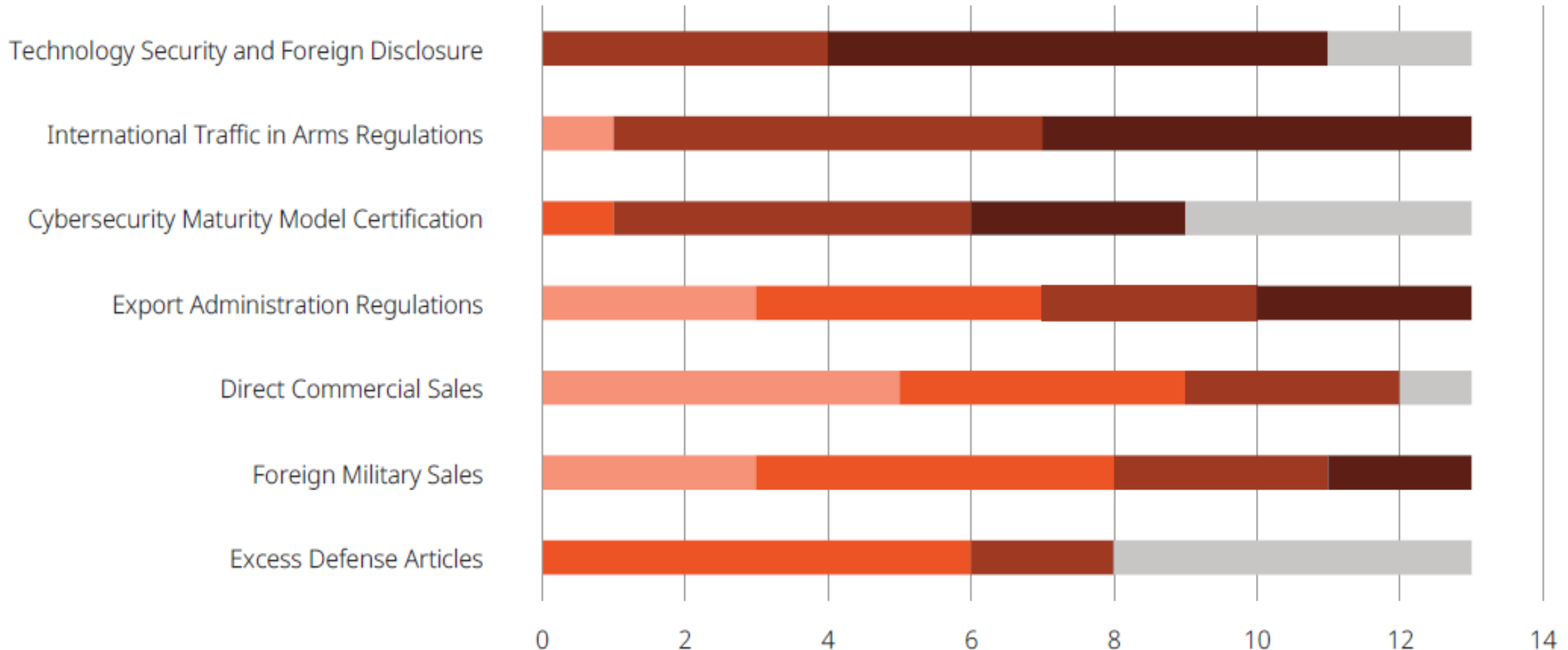
How important are the following goals for defense industrial cooperation?

■ Important ■ Very Important ■ Extremely Important



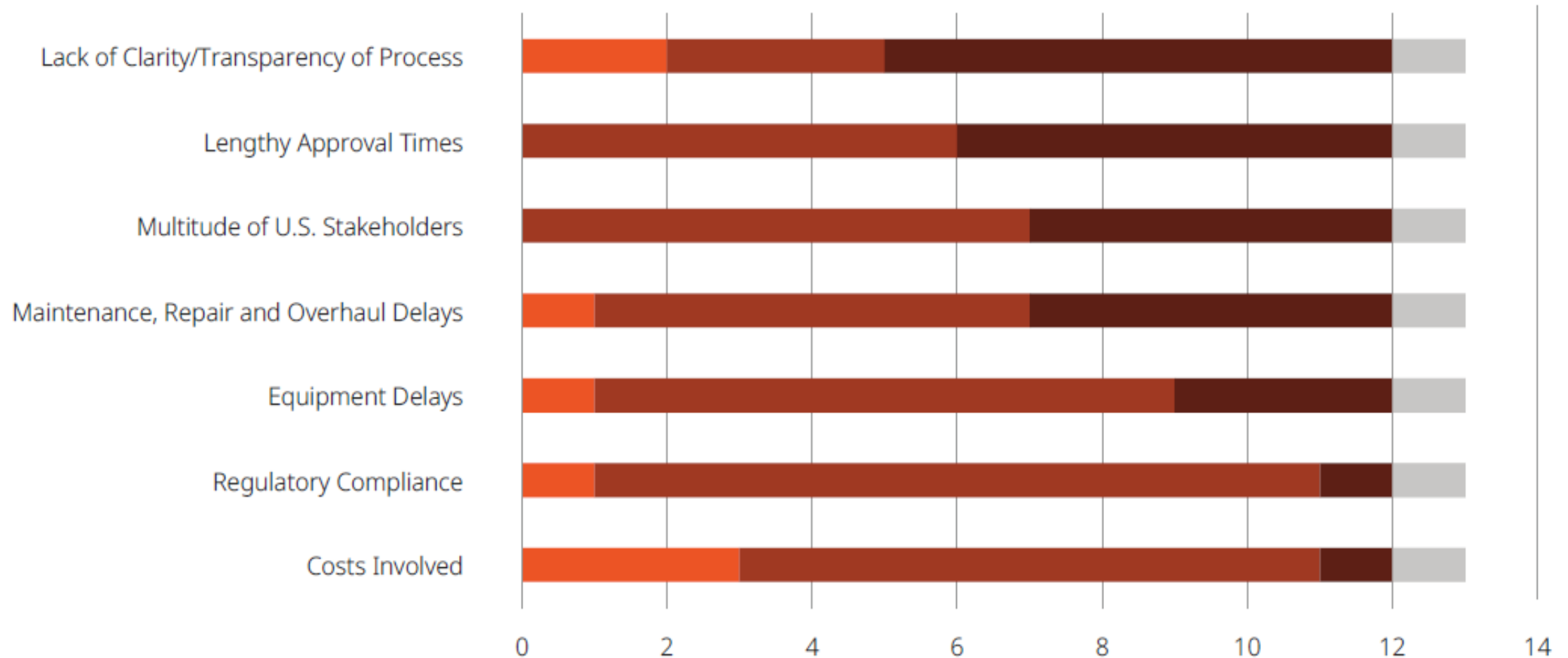
TSFD and ITAR are rated as the most challenging processes partner nations must navigate when doing business with the U.S.

■ Somewhat Challenging ■ Challenging ■ Very Challenging ■ Extremely Challenging ■ N/A



Slow processes, lack of transparency, and multiple stakeholders pose the greatest FMS challenges

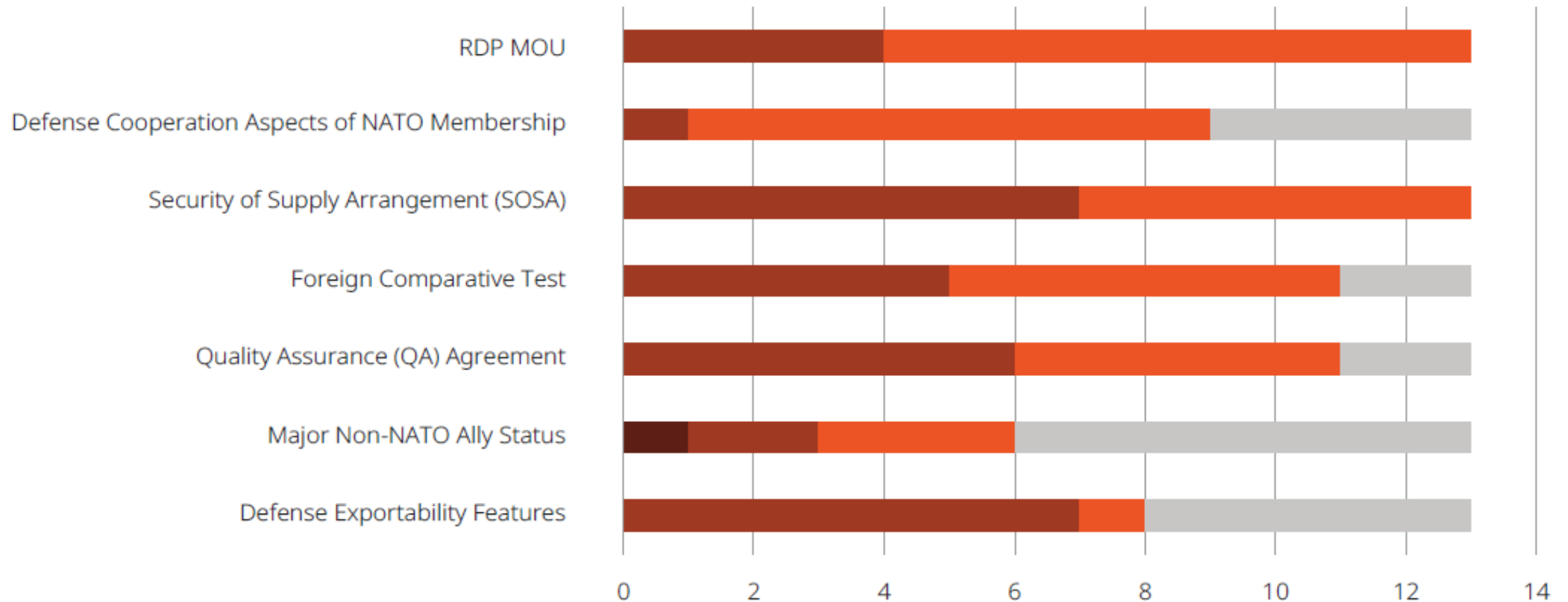
■ Not Challenging ■ Moderately Challenging ■ Extremely Challenging ■ N/A



RDP MOUs and NATO membership are rated as the most beneficial for defense industrial cooperation with the U.S.

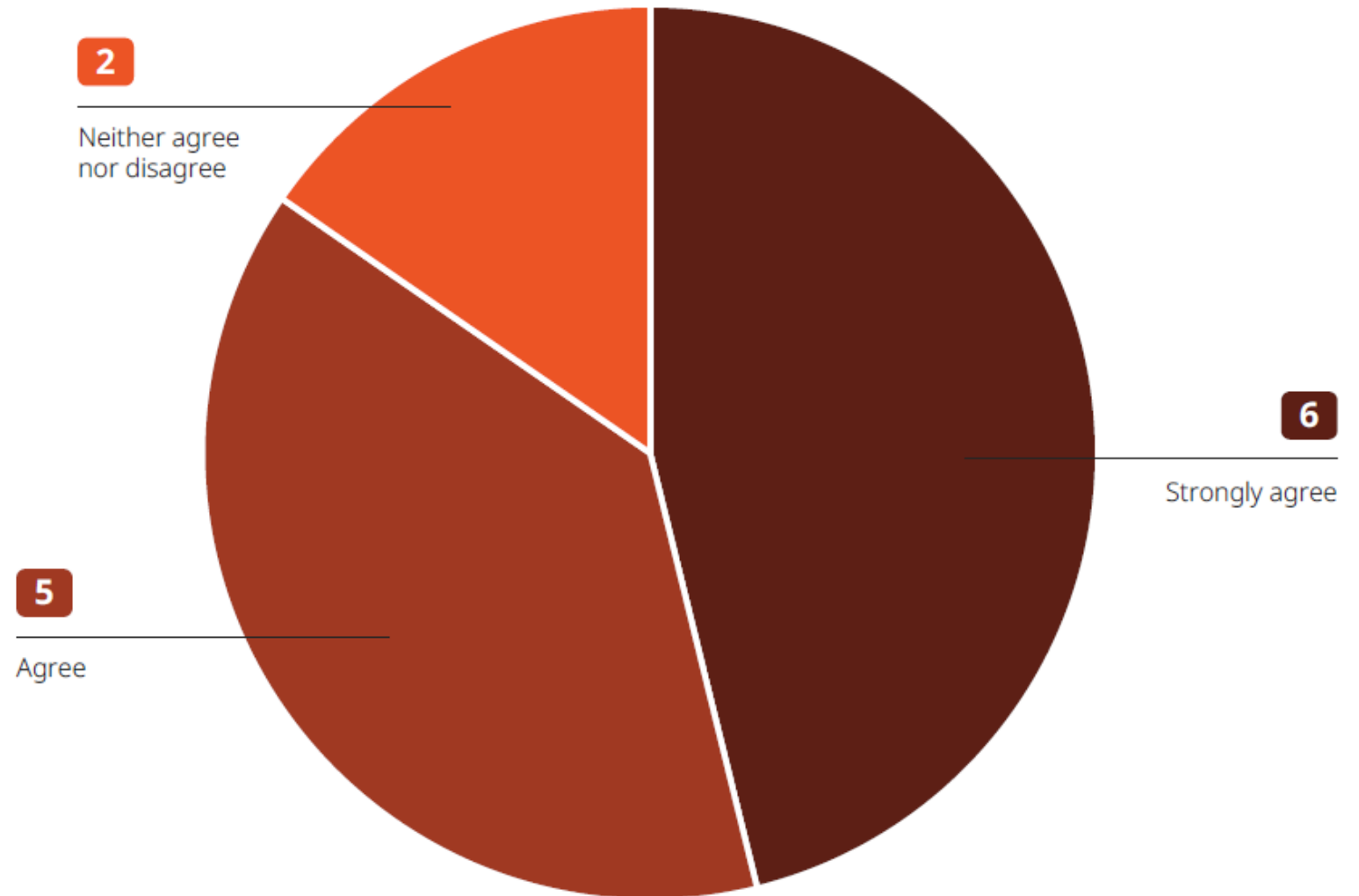
Please rate the following on the basis of how much it benefits your country's ability to do business with the United States:

■ Not Beneficial ■ Moderately Beneficial ■ Extremely Beneficial ■ N/A



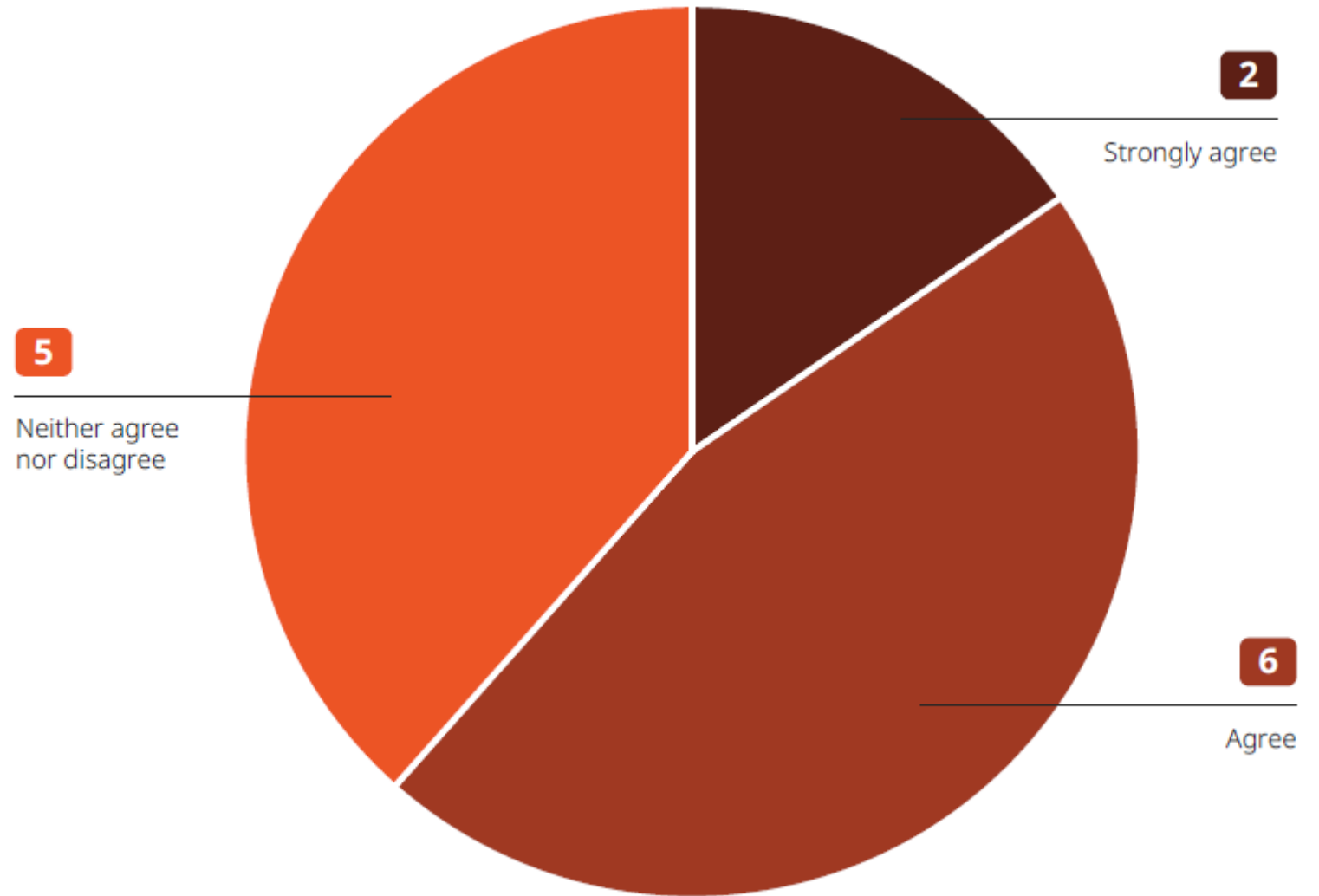
Respondents *Agree* and *Strongly Agree* that RDP MOU exemptions are not well recognized in some U.S. program offices

Please assess the following statement: While RDP MOUs waive Buy American provisions, the existence of this exemption is not well recognized in some U.S. program offices.



Respondents are *Neutral* or *Agree* that Congress & the Executive Branch are Opposed to RDP MOU Exemptions

Please assess the following statement:
Influential members of Congress or the Executive Branch are opposed to the exemptions granted in RDP MOUs, making them less effective than originally perceived.



Insights & Conclusions

Defense industrial integration with allies and partners presents a compelling business case.

Countries with an RDP MOU with the United States are hopeful that the agreement will uplift their own industrial bases through consistency in cooperation and sales.

Periodic reviews of export control policy would ensure it appropriately limits technology proliferation without causing undue delays.

Allies working as a group to procure U.S. systems could be a structural solution to speed the acquisition process.