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INSTITUT DE RELATIONS INTERNATIONALES ET STRATÉGIQUES

PROGRAMME
EUROPE, EUROPEAN UNION, NATO

X-RAY (OR POST-MORTEM?) OF PERMANENT STRUCTURED COOPERATION AND INSIGHTS FOR EUROPEAN COOPERATION

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INTRODUCTION

Permanent Structured Cooperation (PESCO), established by the Lisbon Treaty in 2008, constitutes the political and legal framework intended to host defence cooperation among Member States within the European Union (EU). Its underlying principle is straightforward: those states that wish to cooperate on a specific issue do so together, while those that do not are not required to participate, reflecting the logic of "willing and able" states. In essence, it enables multiple coalitions of the willing, facilitated by the EU. Yet, more than eight years after its launch in 2017, what has been achieved? The outcome is worrying.

The purpose of this study is therefore to provide as objective an assessment as possible of the state of PESCO at the end of 2025, while acknowledging the inherent limitations of such an exercise. The study examines all projects, their composition, participating states, and levels of progress, among other aspects. The findings are unequivocal: for instance, only three projects, out of 83 launched, have achieved their objectives over an eight-year period. PESCO has failed to establish itself as the primary framework for European defence cooperation and has consequently not contributed to a strengthening of European defence.

Should PESCO therefore be considered a failure to be discarded? The most striking illustration of the shortcomings of European cooperation in the field of armaments? Cooperation is a method, cooperation frameworks are instruments, and neither can be an end in themselves. It is the objectives that are at issue, and more specifically the states that define them. Member States are indeed the actors that have constrained the potential of European cooperation as a means of strengthening common defence, and this responsibility is clearly reflected in the analysis of PESCO projects.

DATA AND METHODOLOGY

Status of States' commitments

There are three status for States involved in PESCO, although the rules of governance are relatively flexible[1]:

- **Coordinator**: initiates the launch of the project and coordinates the work with the States involved.

[1] Council Decision (PESC), 25 June 2018 : https://eur-lex.europa.eu/eli/dec/2018/909/oj/eng

- **Participant**: participates in the project by influencing the work. Decisions are taken by unanimous agreement among the participants. The coordinator is a participant like any other in this regard.
- **Observer**: its role varies depending on the project. In most cases, it is invited to meetings and consulted, but has no influence on decision-making.

Project Domains

Domains
Land
Maritime
Air
Cyber
Space
Support
Digital Multidomain
Education, Doctrine, Exercise
Health, CBRN
Tests, Materials
Multidomain Weapons or Systems

The project domain was chosen based on the categorisation proposed by the PESCO website, but also according to the actual actions carried out in the projects. In most cases, a secondary domain was added to clarify the nature of the project.

Project Typology

Type	Characterisation
Strategic Coordination, Sharing	**Objectives**: to ensure coordination among States and establish a common governance framework on a specific topic, to share best practices, to discuss potential future cooperation, and to harmonise strategic cultures. **Examples of deliverables**: regular meetings, conferences, trade fairs, the launch of cooperative projects, etc. **Examples of project**: Military Mobility.
Needs and R&D	**Objectives**: to harmonise and define military requirements, to monitor the initial industrial steps taken in response to these requirements, or to provide a strategic-level

	framework for the conduct of capability and industrial cooperation. **Examples of deliverables**: High-Level Common Requirements, namely in the context of a funded or to-be funded project, regular meetings with industry to follow an R&D project, etc. **Examples of project**: Future Mid-size Tactical Cargo (FMTC).
Training, Formation	**Objectives**: to harmonise training or education, to develop a common syllabus, and to conduct exercises under similar conditions, or even within shared facilities. **Examples of deliverables**: syllabus, doctrine, formation or training currently happening, etc. **Examples of project**: European Defence Airlift Training Academy (EDA-TA).
Operational Structure	**Objectives**: to establish a common structure or institution, potentially by embedding it within an existing multilateral framework (EU, NATO, etc.). **Examples of deliverables**: cell with staff, operational links with multilateral organisations or states, operational commitments, etc. **Examples of project**: Cyber and Information Domain Coordination Centre (CIDCC).

We have identified four types of projects. However, these remain ideal types, as some projects can be characterised as falling between two types. For each project, we have chosen the type that best corresponds to the actual actions carried out within the framework of the project, as well as its stated objectives.

EDF projects related to PESCO projects

Project	European Defence Fund Projects
EUROSIM	FEDERATES
EU CAIH	ACTING
EU TMCC	FEDERATES
iUGS	COMMANDS
iUGS2	FMBTech, iMUGS2
EU BLOS	MARSEUS, FMBTech, AktarEUs
MBT-SIMTEC	FEDERATES, FMBTech
EPC	EPC, EPC2
MAS MCM	E=MCM
MUSAS	SEACURE
M-SASV	EUROGUARD
Air Power	EPIIC, NG-MIMA
AEA	REACTII
Eurodrone	EUDAAS2
FSRM	BEAST
FMTC	FASETT, NG-MIMA, FASETT2
IMLAMD	EISNET
C-UAS	E-CUAS

Project	European Defence Fund Projects
NGMH	ENGRT, NG-MIMA, ENGRT II
CRF	CITADEL Range
CTIRISP	FACT, AIDA
CRRT	AIDA
EUMILCOM	EC2, ECYSAP EYE, AIDA
EHAAP	EuroHAPS
SOCC for SJO	PROTEAS
CIDCC	EUCINF, ECYSAP EYE
MilMob	SDMMS
CBRN SaaS	CBRN SoS
EOF	INDY, NOMAD
TWISTER	ODIN'S EYE II
MAC-EU	FIRES 2
ECoWAR	EICACS, EU-GUARDIAN, EDOCC, ACHILE, LATACC, E-NACSOS, FMBTech
EMC	COUNTERACT
CoHGI	SPIDER
EURAS	Navguard
EU-SSA-N	NAUCRATES, EMISSARY, STAALION

This list is incomplete because the EDF 2024 project files (results announced in 2025) do not mention whether they are linked to a PESCO project, unlike in the previous three years. Even though obvious links can be made (ENGRT II with PESCO NGMH, or BEAST with PESCO FSRM), we have not included the links for this last year. The summary sheet of results mentions the number 13[2]. Furthermore, until this year, an EDF consortium could decide whether or not to declare a link with a PESCO project. Finally, pre-FEDef instrument projects (APRD and PEDID) are not listed, although they could be linked at least in theory (ESSOR, for example).

Deliverables

Deliverables refer to operational objects created by the actions of project participants. Most projects have initial deliverables (‘*intermediate*’), without the final deliverable (‘*yes*’) being produced. A significant number of projects have no deliverables (‘*no*’). Here, the existence of

[2] European Commission’s website : https://defence-industry-space.ec.europa.eu/funding-opportunities-0/calls-proposals/result-edf-2024-calls-proposals_en

an intermediate or final deliverable is determined by taking into account what is mentioned in the PESCO website files, as well as other sources (interviews, reports, press articles). For example, some States declare draft documents or work on a document as intermediate deliverables, which do not constitute operational deliverables and have therefore not been taken into account.

State's Code

Member States	ISO
Austria	AT
Belgium	BE
Bulgaria	BG
Croatia	HR
Cyprus	CY
Czechia	CZ
Denmark	DK
Estonia	EE
Finland	FI
France	FR
Germany	DE
Greece	GR
Hungary	HU
Ireland	IE
Italy	IT
Latvia	LV
Lithuania	LT

Member States	ISO
Luxembourg	LU
Netherlands	NL
Poland	PL
Portugal	PT
Romania	RO
Slovakia	SK
Slovenia	SI
Spain	ES
Sweden	SE

Third States	ISO
Canada	CA
Norway	NO
Switzerland	CH
United Kingdom	GB
United States	US

Malta is the only Member State that is not part of PESCO. Furthermore, only third countries, i.e. non-EU Member States, that are actually participating in at least one project are listed.

TABLE OF PROJECTS LAUNCHED IN PESCO (FROM OLDEST TO MOST RECENT)

Project	Full name of project	Coordinator	Main domain	Secondary domain	Type	Launch year	End year	Number of linked European Defence Fund's project	Delivered object
ETCCEA	[CLOSED] European Training Certification Centre for European Armies (ETCCEA)	IT	Digital Multidomain	Education, Doctrine, Exercise	Training, Formation	2017	2023		No
EU TMCC	[CLOSED] European Union Training Mission Competence Centre (EU TMCC)	DE	Education, Doctrine, Exercise		Training, Formation	2017	2020	1	No
DM-DRCP	Deployable Military Disaster Relief Capability Package (DM-DRCP)	IT	Support	Education, Doctrine, Exercise	Needs and R&D	2017	Current		No
AIFV/AAV/LAV	Armoured Infantry Fighting Vehicle / Amphibious Assault Vehicle / Light Armoured Vehicle (AIFV/AAV/LAV)	IT	Land	Support	Needs and R&D	2017	Current		No
EuroArtillery	[CLOSED] Indirect Fire Support Capability (EuroArtillery)	SK	Land		Needs and R&D	2017	2023		No
EUFOR CROC	[CLOSED] EUFOR Crisis Response Operation Core (EUFOR CROC)	DE	Education, Doctrine, Exercise		Strategic Coordination, Sharing	2017	2024		Intermediate

MAS MCM	Maritime (semi) Autonomous Systems for Mine Countermeasures (MAS MCM)	BE	Maritime		Needs and R&D	2017	Current	1	Intermediate
HARMSPRO	Harbour and Maritime Surveillance and Protection	IT	Multidomain Weapons or Systems	Digital Multidomain	Needs and R&D	2017	Current		Intermediate
UMS	Upgrade of Maritime Surveillance (UMS)	GR	Maritime	Digital Multidomain	Needs and R&D	2017	Current		Intermediate
ESSOR	European Secure Software defined Radio (ESSOR)	FR	Digital Multidomain		Strategic Coordination, Sharing	2017	Current		Intermediate
CTIRISP	Cyber Threats and Incident Response Information Sharing Platform (CTIRISP)	GR	Cyber	Digital Multidomain	Needs and R&D	2017	Current	2	Intermediate
CRRT	Cyber Rapid Response Teams and Mutual Assistance in Cyber Security (CRRT)	LT	Cyber	Education, Doctrine, Exercise	Operational Structure	2017	Current	1	Intermediate
EUMILCOM	Strategic C2 System for CSDP Missions and Operations (EUMILCOM)	ES	Digital Multidomain		Needs and R&D	2017	Current	3	Intermediate
NetLogHubs	Network of Logistic Hubs in Europe and Support to Operations (NetLogHubs)	DE	Support		Operational Structure	2017	Current		Intermediate
MilMob	Military Mobility (MM)	NL	Support		Strategic Coordination, Sharing	2017	Current	1	Yes

EOF	Energy Operational Function (EOF)	FR	Multidomain Weapons or Systems	Support	Strategic Coordination, Sharing	2017	Current	2	Intermediate
EMC	[CLOSED] European Medical Command (EMC)	DE	Health, CBRN	Education, Doctrine, Exercise	Operational Structure	2017	2024	1	Yes
H3 Training	Helicopter Hot and High Training (H3 Training)	GR	Air	Education, Doctrine, Exercise	Training, Formation	2018	Current		Intermediate
JEIS	Joint EU Intelligence School (JEIS)	GR	Education, Doctrine, Exercise		Training, Formation	2018	Current		Intermediate
EUTEC	[CLOSED] EU Test and Evaluation Centres (EUTEC)	FR-SE	Tests, Materials		Needs and R&D	2018	2023		No
iUGS	[CLOSED] Integrated Unmanned Ground Systems (iUGS)	EE	Land	Digital Multidomain	Needs and R&D	2018	2024	1	Yes
EU BLOS	EU Beyond Line Of Sight (BLOS) Land Battlefield Missile Systems (EU BLOS)	FR	Digital Multidomain	Land	Needs and R&D	2018	Current	3	Intermediate
DIVEPACK	Deployable Modular Underwater Intervention Capability (DIVEPACK)	BG	Maritime		Needs and R&D	2018	Current		No
Eurodrone	European Medium Altitude Long Endurance Remotely Piloted Aircraft Systems – MALE RPAS (Eurodrone)	DE	Air	Tests, Materials	Strategic Coordination, Sharing	2018	Current	1	No

TIGER Mk III	[CLOSED] European Attack Helicopters TIGER Mark III	FR	Air	Land	Needs and R&D	2018	2024		No
C-UAS	Counter Unmanned Aerial System (C-UAS)	IT	Digital Multidomain	Air	Needs and R&D	2018	Current	1	Intermediate
EHAAP	European High Atmosphere Airship Platform (EHAAP) – Persistent Intelligence, Surveillance and Reconnaissance (ISR) Capability	IT	Air	Digital Multidomain	Needs and R&D	2018	Current	1	Intermediate
SOCC for SJO	One Deployable Special Operations Forces (SOF) Tactical Command and Control (C2) Command Post (CP) for Small Joint Operations (SJO) – (SOCC) for SJO	GR	Digital Multidomain		Needs and R&D	2018	Current	1	Intermediate
JISR	Electromagnetic Warfare Capability and Interoperability Programme for Future Joint Intelligence, Surveillance and Reconnaissance (JISR)	CZ	Cyber		Needs and R&D	2018	Current		Intermediate
CBRN SaaS	Chemical, Biological, Radiological and Nuclear (CBRN) Surveillance as a Service (CBRN SaaS)	AT	Health, CBRN	Digital Multidomain	Needs and R&D	2018	Current	1	Intermediate

GMSCE	Geo-meteorological and Oceanographic (GeoMETOC) Support Coordination Element (GMSCE)	DE	Space	Digital Multidomain	Needs and R&D	2018	Current		Intermediate
Co-basing	[CLOSED] Co-basing	FR	Support		Operational Structure	2018	2023		No
EURAS	EU Radio Navigation Solution (EURAS)	FR	Space	Cyber	Strategic Coordination, Sharing	2018	Current	1	Intermediate
EU-SSA-N	European Military Space Surveillance Awareness Network (EU-SSA-N)	IT	Space	Digital Multidomain	Needs and R&D	2018	Current	3	No
EUROSIM	Integrated European Joint Training and simulation Centre (EUROSIM)	HU	Digital Multidomain	Education, Doctrine, Exercise	Needs and R&D	2019	Current	1	Intermediate
EU CAIH	EU Cyber Academia and Innovation Hub (EU CAIH)	PT	Cyber	Digital Multidomain	Strategic Coordination, Sharing	2019	Current	1	Intermediate
SMTC	Special Operations Forces Medical Training Centre (SMTC)	PL	Health, CBRN	Education, Doctrine, Exercise	Training, Formation	2019	Current		Intermediate
CBRNDTR	CBRN Defence Training Range (CBRNDTR)	RO	Health, CBRN	Education, Doctrine, Exercise	Training, Formation	2019	Current		Intermediate
EUNDC	European Union Network of Diving Centres (EUNDC)	RO	Maritime	Education, Doctrine, Exercise	Training, Formation	2019	Current		Intermediate

EPC	European Patrol Corvette (EPC)	IT	Maritime		Needs and R&D	2019	Current	2	Intermediate
MUSAS	Maritime Unmanned Anti-Submarine System (MUSAS)	PT	Maritime	Digital Multidomain	Needs and R&D	2019	Current	1	Intermediate
AEA	Airborne Electronic Attack (AEA)	ES	Air	Cyber	Needs and R&D	2019	Current	1	Intermediate
CIDCC	Cyber and Information Domain Coordination Center (CIDCC)	DE	Cyber	Digital Multidomain	Operational Structure	2019	Current	2	Intermediate
TWISTER	Timely Warning and Interception with Space-based TheatER surveillance (TWISTER)	FR	Space	Air	Needs and R&D	2019	Current	1	Intermediate
MAC-EU	Materials and components for technological EU competitiveness (MAC-EU)	FR	Tests, Materials		Strategic Coordination, Sharing	2019	Current	1	Intermediate
ECoWAR	EU Collaborative Warfare Capabilities (ECoWAR)	FR	Digital Multidomain	Education, Doctrine, Exercise	Needs and R&D	2019	Current	7	Intermediate
GLORIA	European Global RPAS Insertion Architecture System (GLORIA)	IT	Air	Education, Doctrine, Exercise	Needs and R&D	2019	Current		No
MBT-SIMTEC	Main Battle Tank Simulation and Testing Center (MBT-SIMTEC)	GR	Education, Doctrine, Exercise	Digital Multidomain	Needs and R&D	2021	Current	2	Intermediate
4E	Essential Elements of European Escort (4E)	ES	Maritime		Needs and R&D	2021	Current		Intermediate

M-SASV	Medium size Semi-Autonomous Surface Vehicle (M-SASV)	EE	Maritime	Cyber	Needs and R&D	2021	Current	1	Intermediate
Air Power	Air Power	FR	Air		Needs and R&D	2021	Current	2	No
FMTC	Future Medium-size Tactical Cargo (FMTC)	FR	Air	Support	Needs and R&D	2021	Current	3	Intermediate
NGSR	Next Generation Small RPAS (NGSR)	ES	Air	Digital Multidomain	Needs and R&D	2021	Current		No
SSW	Small Scalable Weapons (SSW)	IT	Air	Land	Needs and R&D	2021	Current		No
SATOC	Strategic Air Transport for Outsized Cargo (SATOC)	DE	Air	Support	Needs and R&D	2021	Current		Intermediate
RDSD	Rotorcraft Docking Station for Drones	IT	Air	Digital Multidomain	Needs and R&D	2021	Current		No
AMIDA-UT	Automated Modelling, Identification and Damage Assessment of Urban Terrain (AMIDA-UT)	PT	Digital Multidomain	Education, Doctrine, Exercise	Needs and R&D	2021	Current		Intermediate
CRF	Cyber Ranges Federations (CRF)	EE	Cyber		Strategic Coordination, Sharing	2021	Current	1	Intermediate
CoHGI	Common Hub for Governmental Imagery (CoHGI)	DE	Digital Multidomain	Space	Needs and R&D	2021	Current	1	No
DoSA	Defence of Space Assets (DoSA)	FR	Space	Education, Doctrine, Exercise	Strategic Coordination, Sharing	2021	Current		Intermediate

EU MilPart	EU Military Partnership (EU MilPart)	FR	Education, Doctrine, Exercise		Strategic Coordination, Sharing	2021	Current		Intermediate
EDA-TA	European Defence Airlift Training Academy (EDA-TA)	FR	Air	Education, Doctrine, Exercise	Training, Formation	2023	Current		Intermediate
CoBaS	Counter Battery Sensors (CoBaS)	FR	Land	Digital Multidomain	Needs and R&D	2023	Current		Intermediate
iUGS2	Integrated Unmanned Ground Systems 2 (iUGS2)	EE	Land	Digital Multidomain	Needs and R&D	2023	Current	2	Intermediate
ATT	Anti-Torpedo Torpedo (ATT)	DE	Maritime		Needs and R&D	2023	Current		No
CSIP	Critical Seabed Infrastructure Protection (CSIP)	IT	Maritime	Digital Multidomain	Needs and R&D	2023	Current		No
FSRM	Future Short-Range Air to Air Missile (FSRM)	DE	Air		Needs and R&D	2023	Current	1	No
IMLAMD	Integrated Multi-Layer Air and Missile Defence system (IMLAMD)	IT	Digital Multidomain	Air	Needs and R&D	2023	Current	1	No
NGMH	Next Generation Medium Helicopter (NGMH)	FR	Air	Land	Needs and R&D	2023	Current	3	No
ACCESS	Arctic Command & Control Effector and Sensor System (ACCESS)	FI	Digital Multidomain		Needs and R&D	2023	Current		Intermediate
ROCOMIN	Robust Communication Infrastructure and Networks (ROCOMIN)	SE	Digital Multidomain	Cyber	Needs and R&D	2023	Current		No

R2F	ROLE 2F	ES	Health, CBRN	Education, Doctrine, Exercise	Training, Formation	2023	Current		No
JEEWCI	Joint European Electromagnetic Warfare Convergence Initiative (JEEWCI)	DE	Cyber	Education, Doctrine, Exercise	Training, Formation	2025	Current		No
SLIA	Substitute for Lead in Infantry Ammunition (SLIA)	DE	Tests, Materials		Needs and R&D	2025	Current		No
NGDSS	Next Generation Dismounted Soldier System (NGDSS)	IT	Digital Multidomain	Land	Needs and R&D	2025	Current		No
InfNav w/o GNSS	Infantry Navigation w/o GNSS (InfNav w/o GNSS)	DE	Digital Multidomain		Needs and R&D	2025	Current		No
DES	Directed Energy Systems (DES)	IT	Multidomain Weapons or Systems	Air	Needs and R&D	2025	Current		No
CHOI	Common Handheld Optronic Interface (CHOI)	DE	Digital Multidomain	Land	Needs and R&D	2025	Current		No
MSV	Modular Seabed Vessel (MSV)	IT	Maritime		Needs and R&D	2025	Current		No
FAARC	Future (unmanned) Air-to-Air Refuelling Capability	DE	Air	Digital Multidomain	Needs and R&D	2025	Current		No
UNATIS	Unmanned Air Transport of Injured Soldiers (UNATIS)	DE	Air	Health, CBRN	Needs and R&D	2025	Current		No
QUEST	Quantum Enablers for Strategic Advantage (QUEST)	FI	Digital Multidomain		Needs and R&D	2025	Current		No
MTF R2F-CD	Medical Treatment Facility Role 2 Forward-Capability Development (MTF R2F-CD)	FR	Health, CBRN		Strategic Coordination, Sharing	2025	Current		No

TABLE OF THE INVOLVEMENT OF STATES IN PROJECTS

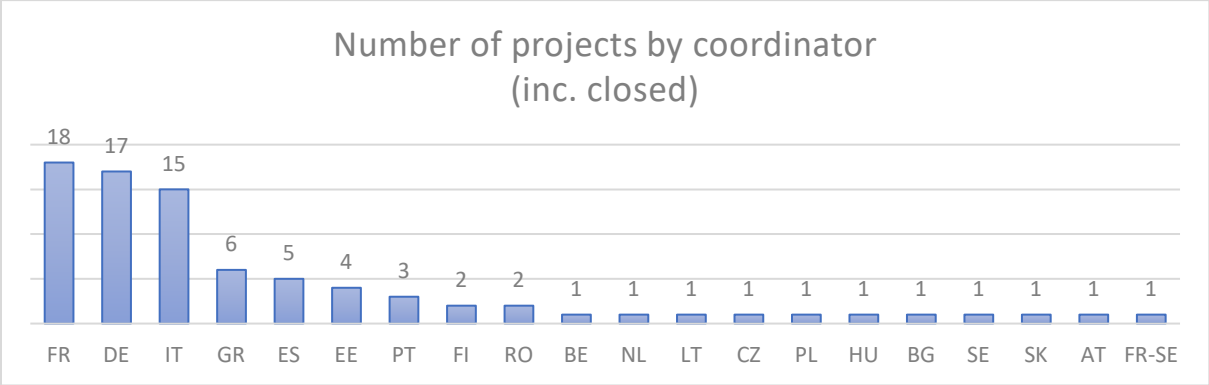
Project	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	GR	HU	IE	IT	LV	LT	LU	NL	PL	PT	RO	SK	SI	ES	SE	CA	NO	CH	GB	US	Number of P and C	Number of O
ETCCEA												P			C										O							**2**	1
EU TMCC	P					P				P	C			P	P			P	P			P			P	P						**11**	0
DM-DRCP	P		O	P								P		P	C						O				P							**6**	2
AIFV/AAV/LAV						O						P		O	C		O						P		O							**3**	4
EuroArtillery													P		P								C									**3**	0
EUFOR CROC	P				P	O				P	C	P	O	O	P				P					O	P							**8**	4
MAS MCM		C						O	O	P	O	P		P		P			P	P	P	P			O	P						**10**	4
HARMSPRO			O					O				P		O	C				O	P	P											**4**	4
UMS			P	P	P					P		C		P	P						O				P							**8**	1
ESSOR								O	P	C	P			O	P	O			P	P	P				P	O						**8**	4
CTIRISP					P					O		C	P	P	P		O	O		O	P				O							**6**	5
CRRT	P	P		P			P	P	O	O		O			P	P	C		P	P		P		P	O							**12**	4
EUMILCOM										P	P				P			P			P				C							**6**	0
NetLogHubs		P	P	P	P	O			P	P	C		P	P	P	O		P	P	P	O	P	P	P	P	O	P					**18**	4
MilMob	P	P	P	P	P	P	P	P	P	P	P	P	P	O	P	P	P	P	C	P	P	P	P	P	P	P	P	P	P	P	P	**30**	1
EOF		P								C		O		O	P				O		O			P	P							**5**	4
EMC		P	O			P		P		P	C		P		P		O	P	P	P	O	P	P		P	P						**14**	3
H3 Training												C			P					O		P										**3**	1
JEIS					P	O						C	O				O		O		O											**2**	5
EUTEC										C													P			C						**3**	0
iUGS		P				P		C	P	P	P	O	O		O	P			P	P					P	O						**10**	4
EU BLOS		P			P					C	O					O			O							P						**4**	3

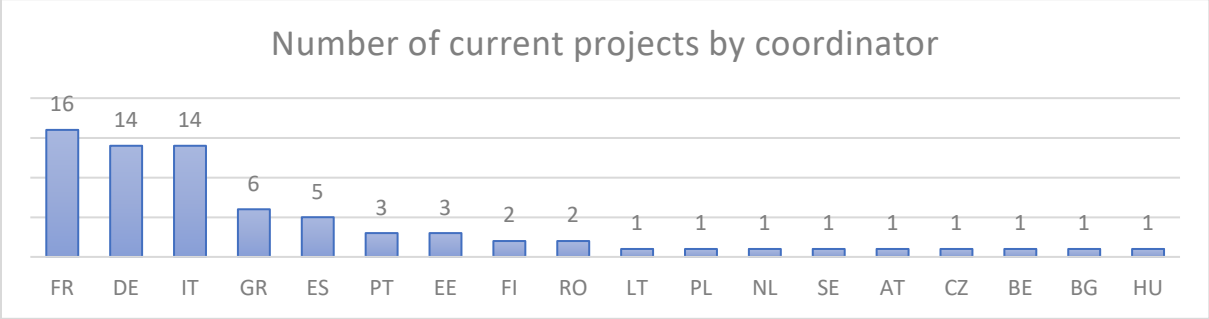
Project	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	GR	HU	IE	IT	LV	LT	LU	NL	PL	PT	RO	SK	SI	ES	SE	CA	NO	CH	GB	US	Number of P and C	Number of O
DIVEPACK			C							P		P			P					O		P										**5**	1
Eurodrone		O				P			O	P	C			O	P				O	O	O				P							**5**	6
TIGER Mk III										C															P							**2**	0
C-UAS		O				P			O	O	O	O		O	C		O		O	O	O				O	P						**3**	11
EHAAP										P			O		C				O	O												**2**	3
SOCC for SJO					P							C									O											**2**	1
JISR					O	C					P				O	P	P		O							O							**4**	4
CBRN SaaS	C			P		O				P			P		O									P								**5**	2
GMSCE	P	P								P	C	P						P	O	O	P	P				O							**8**	3
Co-basing		P				P				C	P								P						P							**6**	0
EURAS	P	P				O				C	P		O	O	P			O	P	P					P	P							**9**	4
EU-SSA-N										P	P				C			O	P	O					P	O							**5**	3
EUROSIM										P	P	O	C			O	O		O	P	O	O		P									**5**	6
EU CAIH		O	P							O		O		O	O				O	O	C	P		O									**3**	8
SMTC						O							P	O						C			O		O								**2**	4
CBRNDTR										P					P				O		O	C											**3**	2
EUNDC			P							P	P			O								C			O							**4**	2
EPC										P	O	P		O	C						O	P			P								**5**	3
MUSAS		O								P	O	O			O						C				P	P							**4**	4
AEA										P					O										C	P							**3**	1
CIDCC	O	O		O	O	O		O		P	C	O	P	O	O				P	O	O	O	O		O								**4**	14
TWISTER	P	O							P	C	P				P				P						P	O							**7**	2
MAC-EU						O				C	P	O			O				O		P	P			P	O							**5**	5
ECoWAR		P								C	O	O	O		O				O	P	O	P			P	P							**6**	6
GLORIA					O	O				P					C				O		O	P				O							**3**	5
MBT-SIMTEC					P	O						C																				**2**	1

Project	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	GR	HU	IE	IT	LV	LT	LU	NL	PL	PT	RO	SK	SI	ES	SE	CA	NO	CH	GB	US	Number of P and C	Number of O
4E											O	P			P				P		P				C	P						**6**	1
M-SASV								C	O	P						P	O			O		P				P						**5**	3
Air Power				P						C	O	P	O						O		O				O	P						**4**	5
FMTC									O	C	P	O		O	P		O	O		O					P	P						**5**	6
NGSR	O									O	O	O	P	O					O		P	P	O	P	C	O						**5**	8
SSW										P					C		O							O	O							**2**	3
SATOC		O				P			O	P	C		O		O				P	O	O		O	O		O						**4**	9
RDSD										P	O				C		O		O					O								**2**	4
AMIDA-UT	P		O			O				P	O	O					O				C	O			P							**4**	6
CRF	P	P	P			O		C	P	P	O	O	O		P	O		P		O		O				O			P			**9**	8
CoHGI	P		O			O			O	P	C		O	O	O		P	P	P	O	O	P			P	O						**8**	9
DoSA	P					O			O	C	P				P				O	P	P	P			P	O						**8**	4
EU MilPart	P	O				O		P		C			O	O	P							O										**4**	5
EDA-TA		O							O	C	O		P		P		O		O	O	P				P	O						**5**	7
CoBaS									O	C	O	O	O		O		O		P	O	O				O	O						**2**	10
iUGS2			O			P		C	P	P	P	O	P		P	P	O		P	O	O				O	P						**10**	6
ATT											C				O				P	O	O				O	O						**2**	5
CSIP		P	O				O		O	P	P			P	C						P				P	P						**8**	3
FSRM											C	O	P		P										P	P						**5**	1
IMLAMD										P	O	O	P		C				O		O					P						**4**	4
NGMH									P	C	P	O	O		P										P	O						**5**	3
ACCESS			O					P	C	P	O								O							P						**4**	3
ROCOMIN			O					P			P	O			O				O		O					C						**3**	5
R2F		P	P						P	P	O	O	O		O					O	P				C	P						**7**	5
JEEWCI											C								P													**2**	0
SLIA						P					C																					**2**	0
NGDSS															C	P																**2**	0

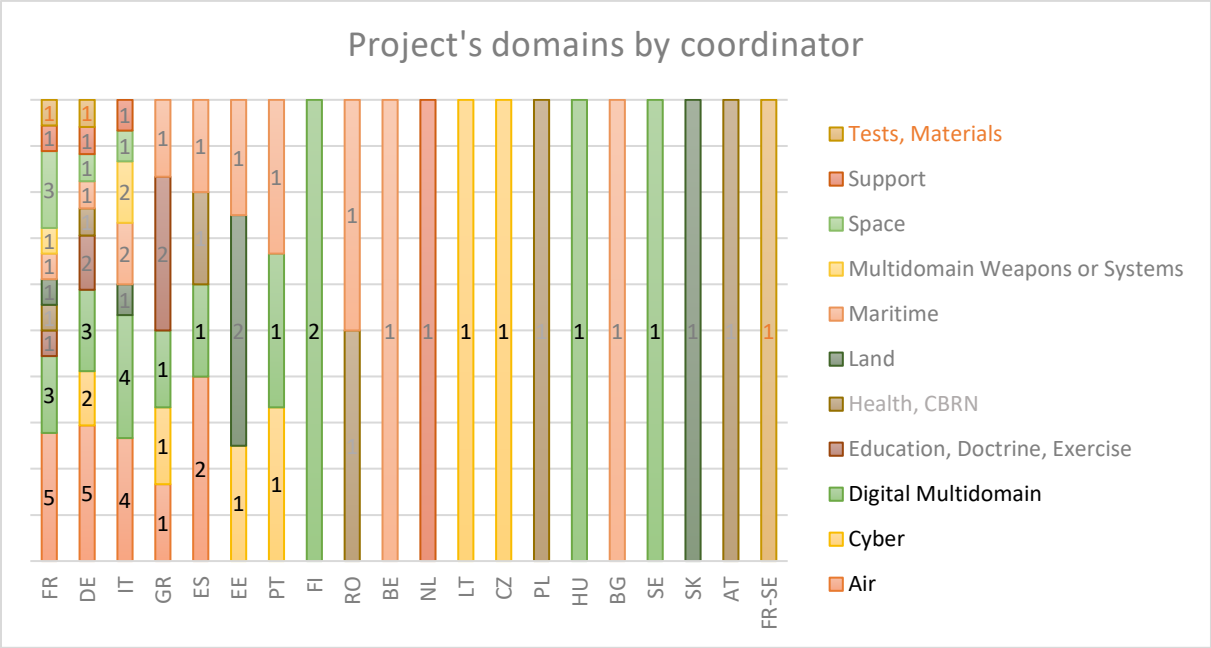
DATA CROSS-REFERENCING (GRAPHS)

Coordinators

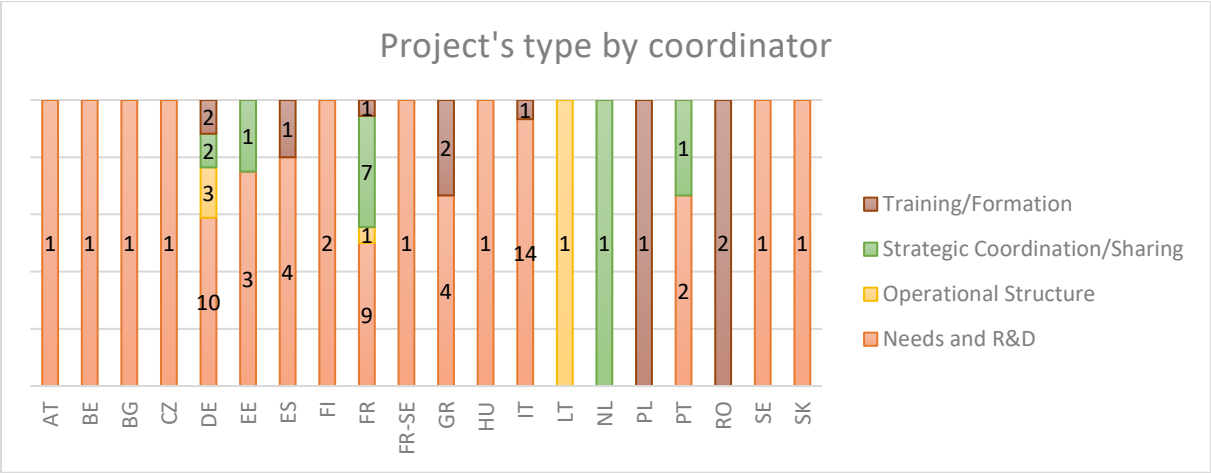




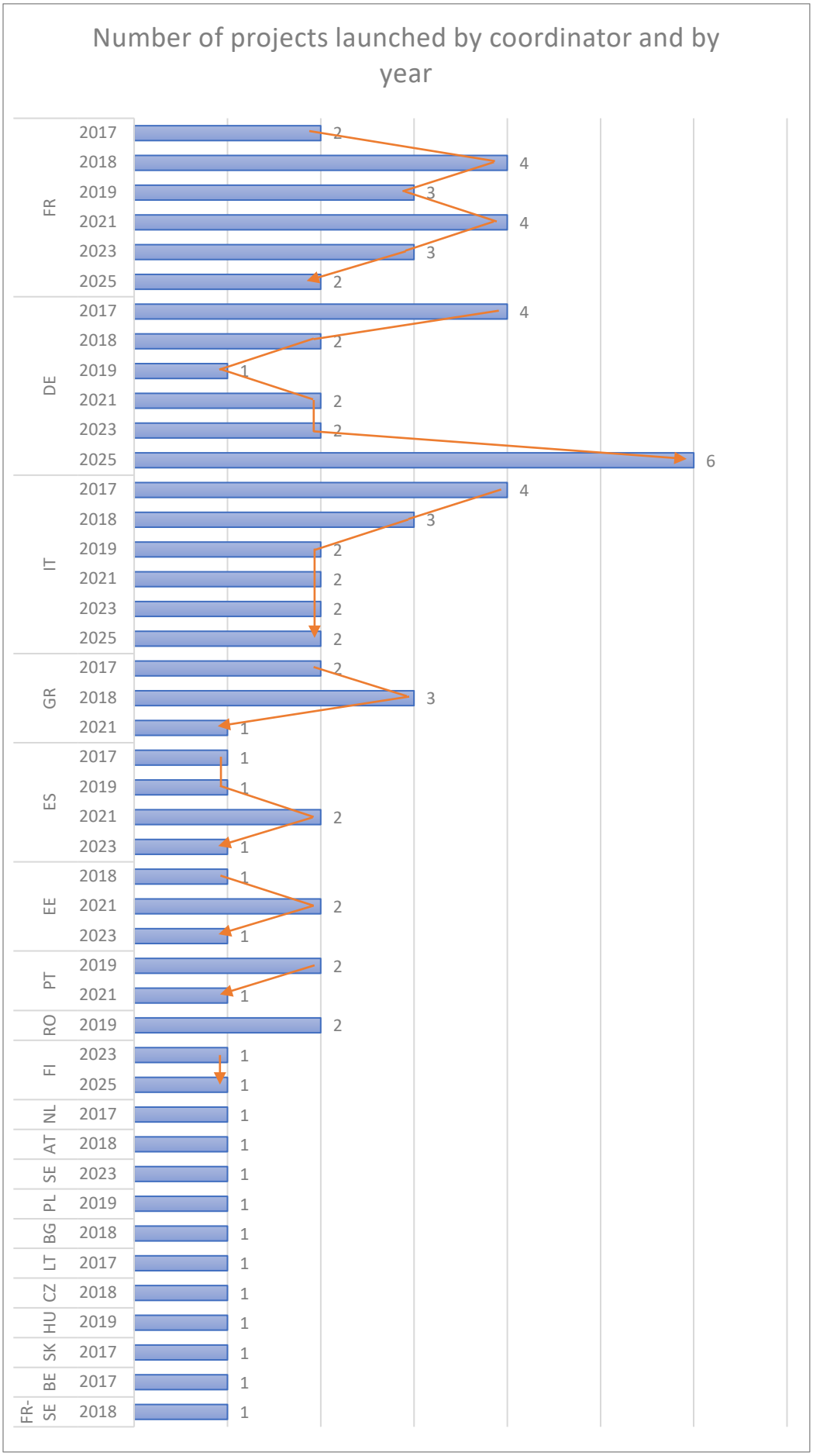
Number of projects per coordinator. Three countries stand out among the project coordinators: France, Germany and Italy. Together, they coordinate nearly half of all projects. Greece and Spain follow, but at some distance, coordinating around three times fewer projects. One project, EUTEC, coordinated jointly by France and Sweden, is worth noting. This is an option available to Member States, but one that has only been used once. Although not visible in the statistics, the NetLogHubs project is officially coordinated by Germany, but France and Cyprus also co-coordinate it in practice, each being responsible for a specific area of work.



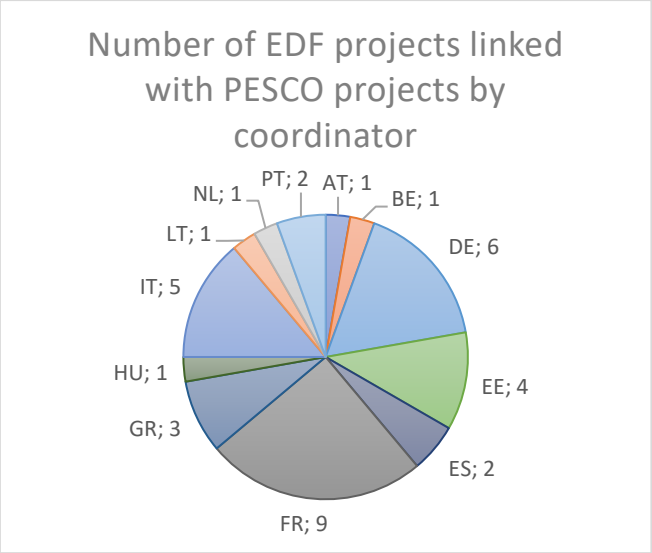
Project domains by coordinator. No significant points to highlight.



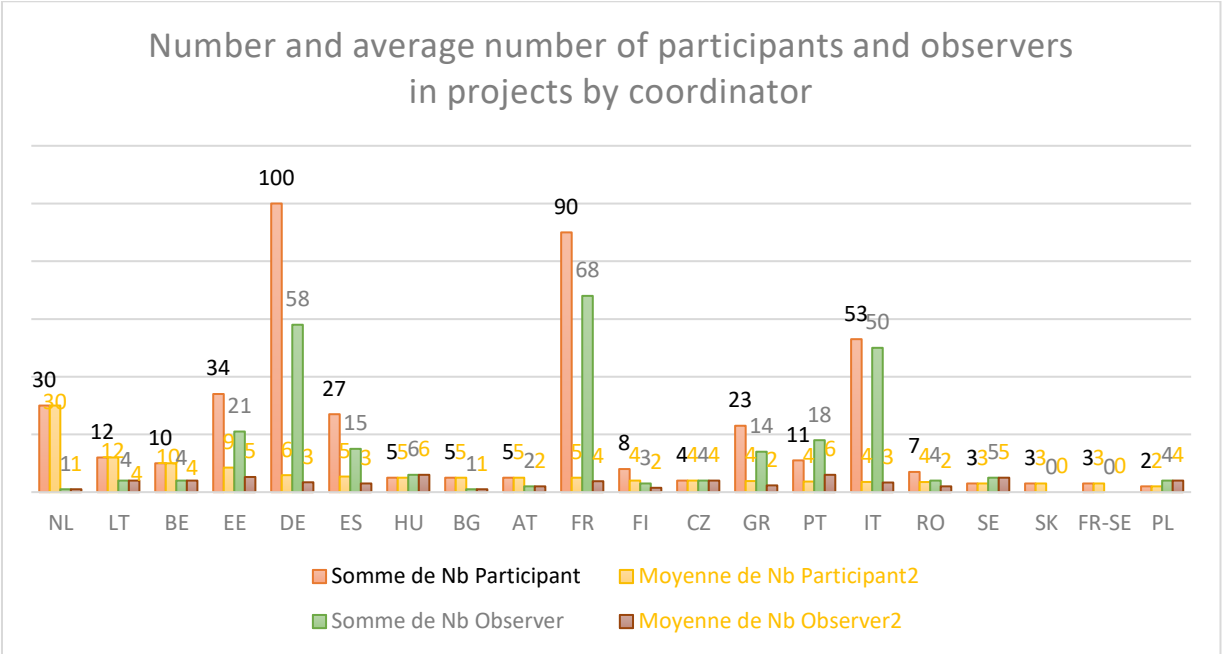
Types of projects by coordinator. There are no significant points to highlight, except for two countries: France, where the proportion between Needs and R&D and Strategic Coordination/Sharing is more balanced than in other countries, particularly Italy, another major coordinator, but which focuses almost exclusively on Needs and R&D. This may indeed correspond to two different visions of PESCO, at least initially. France sees more than Italy the value of using PESCO as a framework for harmonising national visions (and if possible, based on its own vision), while Italy is more focused on the emergence of industrial projects.


Number of projects launched by coordinator and by year
FR 2017 2 2018 4 2019 3 2021 4 2023 3 2025 2
DE 2017 4 2018 2 2019 1 2021 2 2023 2 2025 6
IT 2017 4 2018 3 2019 2 2021 2 2023 2 2025 2
GR 2017 2 2018 3 2021 1
ES 2017 1 2019 1 2021 2 2023 1
EE 2018 1 2021 2 2023 1
PT 2019 2 2021 1
RO 2019 2
FI 2023 1 2025 1
NL 2017 1
AT 2018 1
SE 2023 1
PL 2019 1
BG 2018 1
LT 2017 1
CZ 2018 1
HU 2019 1
SK 2017 1
BE 2017 1
FR-SE 2018 1

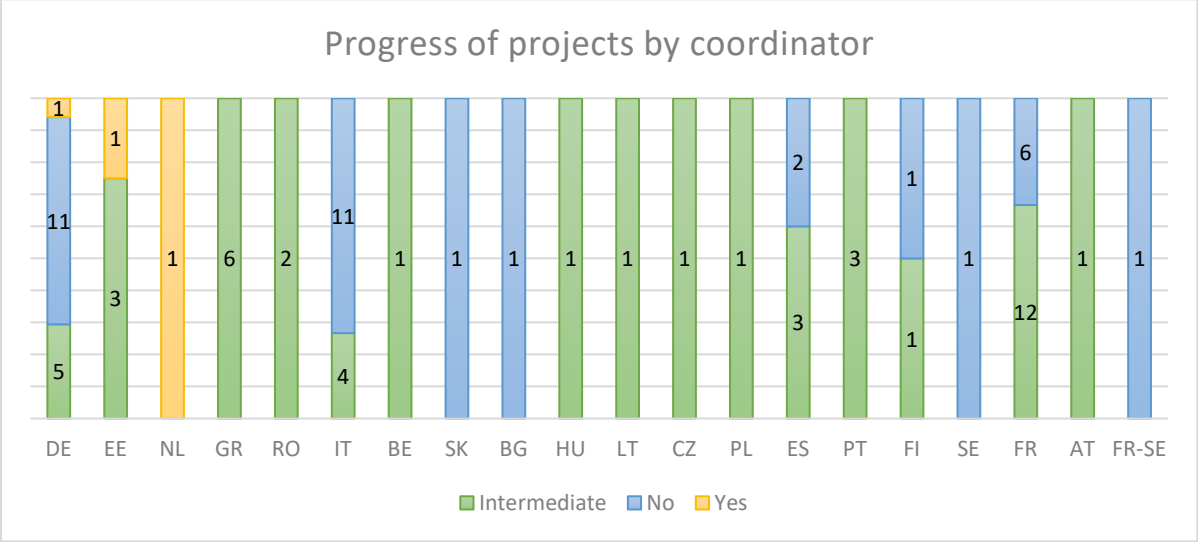
Number of projects launched per year and per coordinator. As we will see below with the evolution of the level of commitment, the number of projects coordinated by each country is decreasing, with the notable exception of Germany, which launched six projects last year. Five of the six projects are of the Needs and R&D type and anticipate topics at the EDF.



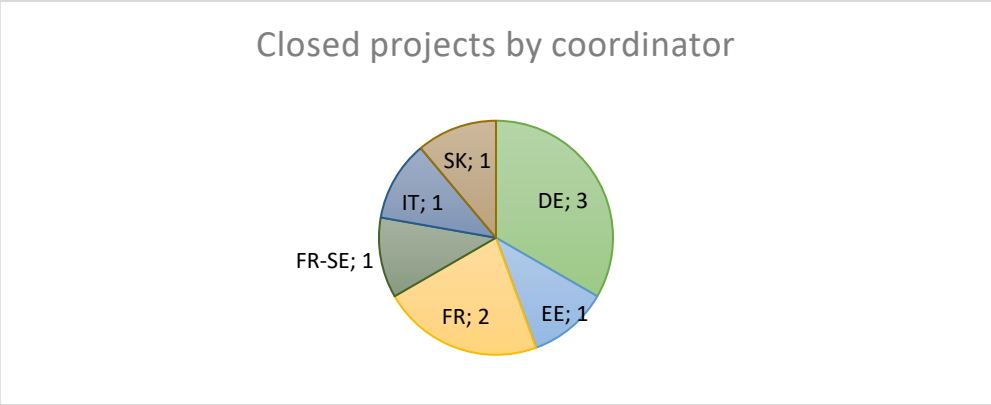
Number of EDF projects linked to a PESCO project per coordinator. France stands out slightly from the top three. Most coordinators of Needs and R&D projects have understood the benefits of combining PESCO and EDF, although this may have led to the launch of artificial PESCO projects in order to obtain more funding for a EDF project. In some cases, PESCO projects are even empty.



Number and average number of participants and observers in PESCO projects by coordinator. The three largest countries stand out in terms of numbers, but not necessarily in terms of averages. Germany, however, attracts slightly more states to its projects. Furthermore, with six projects launched by Germany with only two participants in each (except one), the average has recently fallen. Estonia attracts the most participants on average among the states that have proposed more than one project. As for observers, their status does not mean the same thing in all projects, but in general, it is (i) an indicator of interest but without resources to allocate, (ii) mistrust and/or a desire for surveillance, or (iii) a diplomatic gesture with minimal military interest.

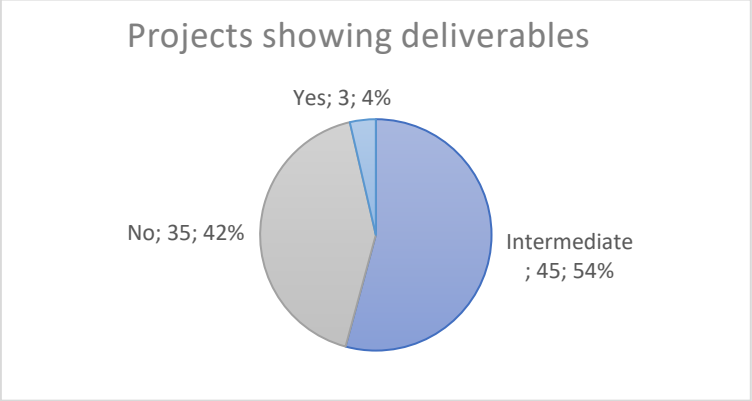


Progress of projects by coordinator. Only three projects have produced a concrete deliverable. Some may have led to results in other frameworks, blurring the outcome of the PESCO framework. For example, the ESSOR project, coordinated by France, led to a common standard, but the PESCO project itself was not facilitated; OCCAR was used instead. Several projects follow this same model, demonstrating the lack of added value of PESCO compared to other cooperation frameworks, at least in practice. Of the three major coordinators, only Germany has completed a project that achieved its objective, the EMC, with the creation of a genuine organisation.

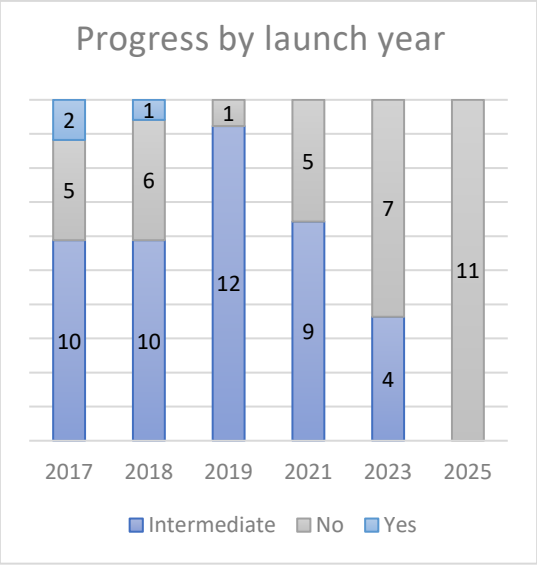


Projects closed by coordinator. Germany is the country that has closed the most projects, but each of the three projects has achieved a different level of progress. France, if we also count the project it coordinated with Sweden, is on a par, and its three projects were closed without having delivered.

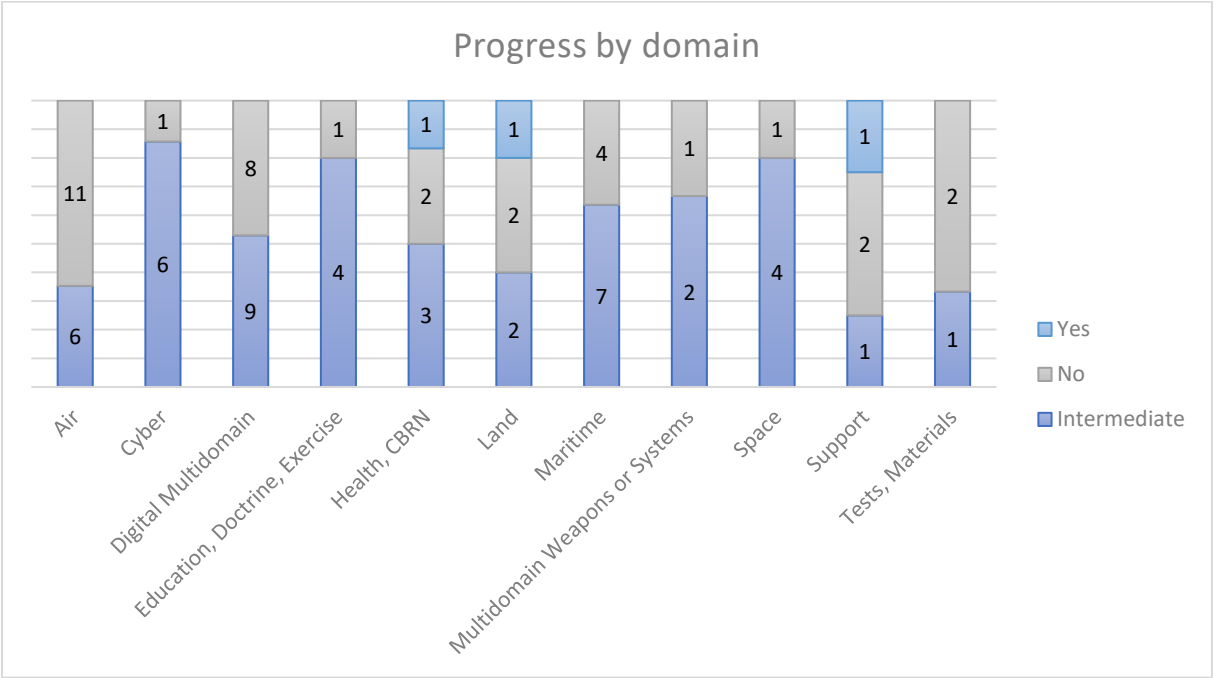
Progress



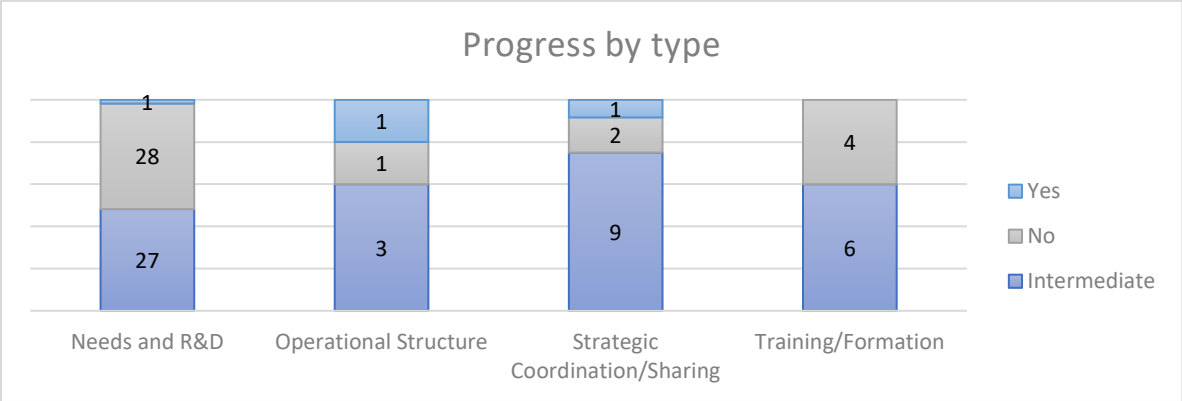
Projects demonstrating deliverables. The statistics are striking. Most projects present intermediate deliverables, particularly common requirements documents, but many have not yet produced anything, or at best a project agreement, which only serves to regulate the actions of the States in the project – and therefore cannot be considered a serious deliverable.



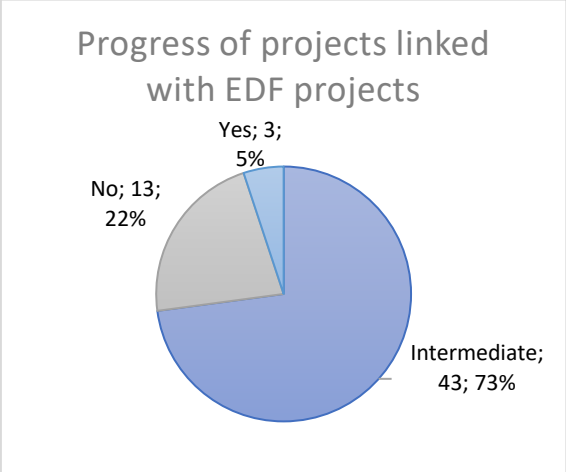
Projects demonstrating deliverables by launch year. Quite logically, the three projects that delivered are among the oldest. Nevertheless, even among those in the first two waves, nearly a third of the projects still delivered nothing. This proportion improves with the 2019 projects, indicating a certain maturity of the projects launched. In the subsequent waves, it is difficult to identify any significant elements, except perhaps the high proportion of projects that have still not delivered anything, even at an intermediate stage, which is not a sign of interest in cooperation on the part of the States.



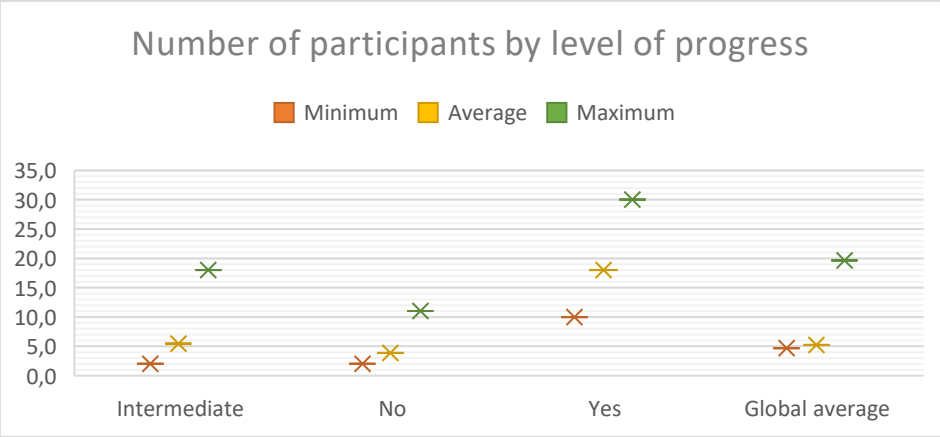
Progress by project domain. The Air domain appears to be the one in which States find it most difficult to cooperate.



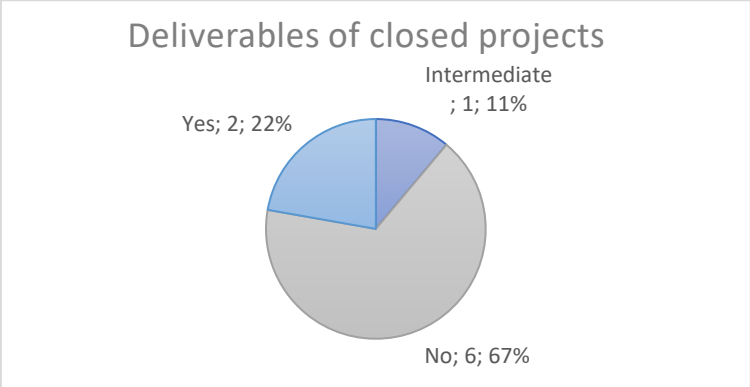
Progress by project type. Strategic Coordination/Sharing projects are performing relatively better than other types of projects, particularly Needs and R&D projects, 50% of which have not yet delivered.



Progress of PESCO projects linked to at least one EDF project. Three quarters of projects linked to an EDF project (all of which are still ongoing) show intermediate deliverables, which could support the idea that the PESCO serves as a strategic circle between states supervising an industrial consortium. The reality is more complex, with few PESCO projects playing this role. The three PESCO projects that have delivered were linked to an EDF project, but two are still ongoing. The analysis is therefore not necessarily relevant. Nevertheless, if we focus on the 13 PESCO projects linked to at least one EDF project that has not shown any deliverables, this clearly demonstrates that the link between the two frameworks is not standardised and is subject to abuse.

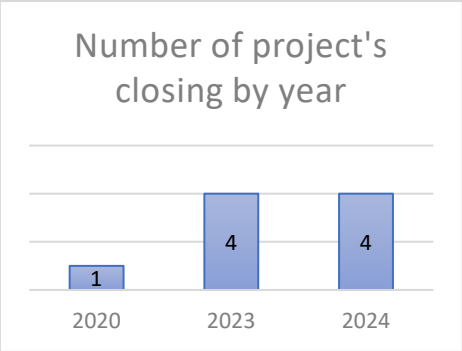


Number of participants per level of progress. The common belief that cooperation is more effective with a small number of states is not borne out here; in fact, the opposite is closer to reality. The level of commitment of states depends more on their genuine interest in cooperation and on the appeal of the coordinator's proposal (including in terms of the method of implementation).

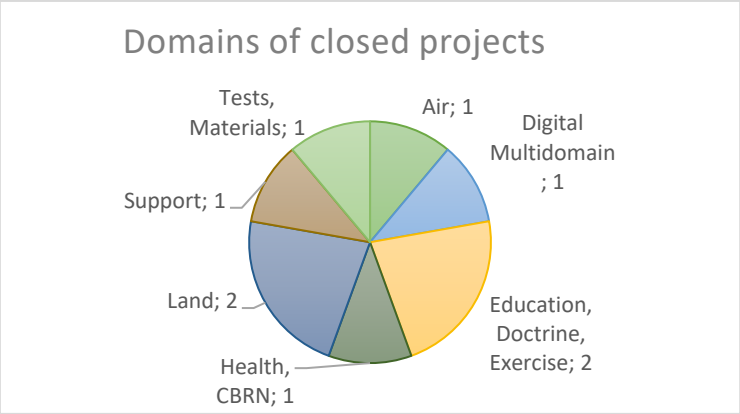


Progress of closed projects. Most of the projects that have been closed today have not delivered. In fact, they were closed because the States agreed that cooperation could not be carried out, which in itself is a guarantee of the honesty of the cooperation. Two of the three projects that delivered have been closed.

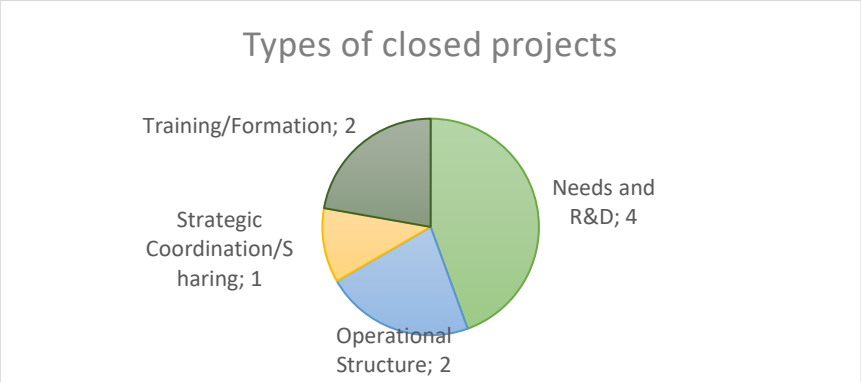
Closed projects



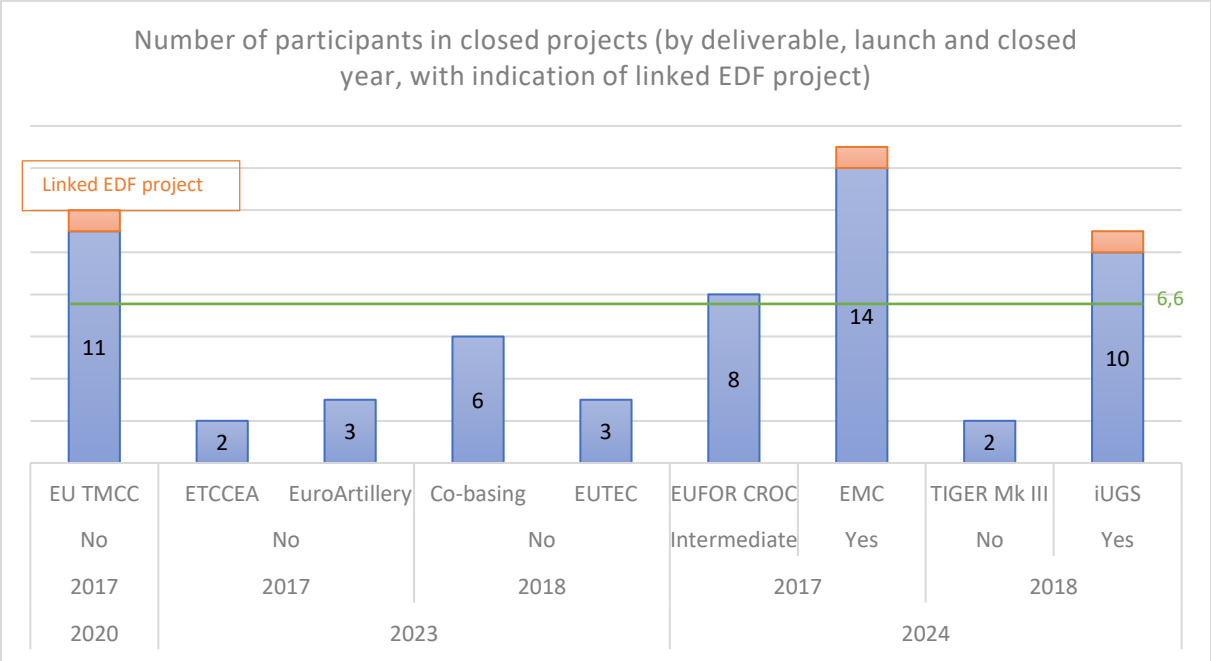
Projects closed per year. Nine projects have been closed out of the 83 launched since the PESCO began.



Domain of closed projects. No significant points to note, as the domains covered are diverse.

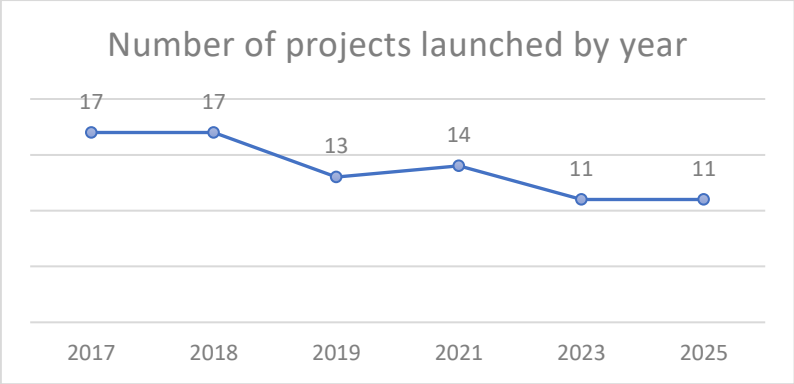


Type of closed projects. Needs and R&D projects are the most numerous, but they represent the majority of projects, so this does not indicate a trend.

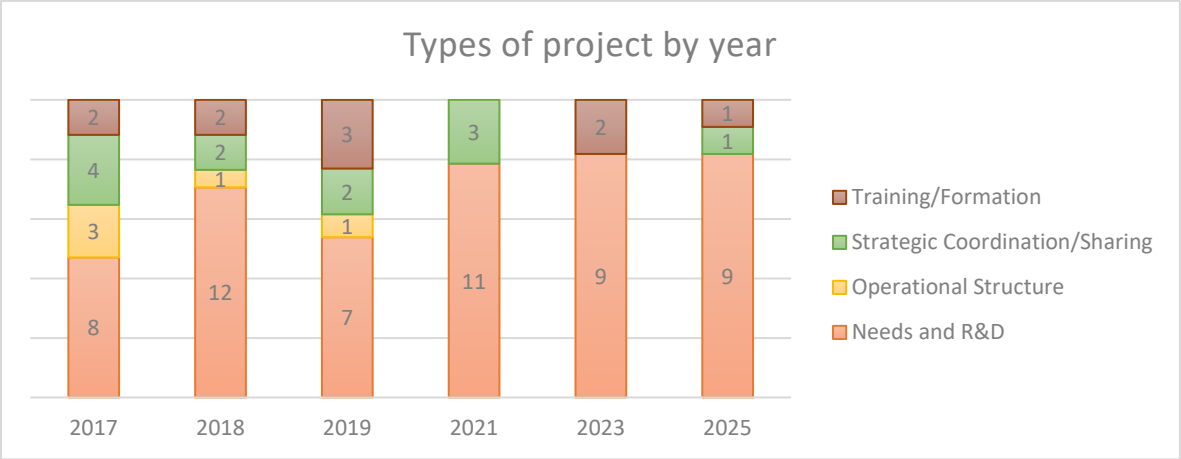


Number of participants, progress and link to an EDF project for closed projects. No significant points to note.

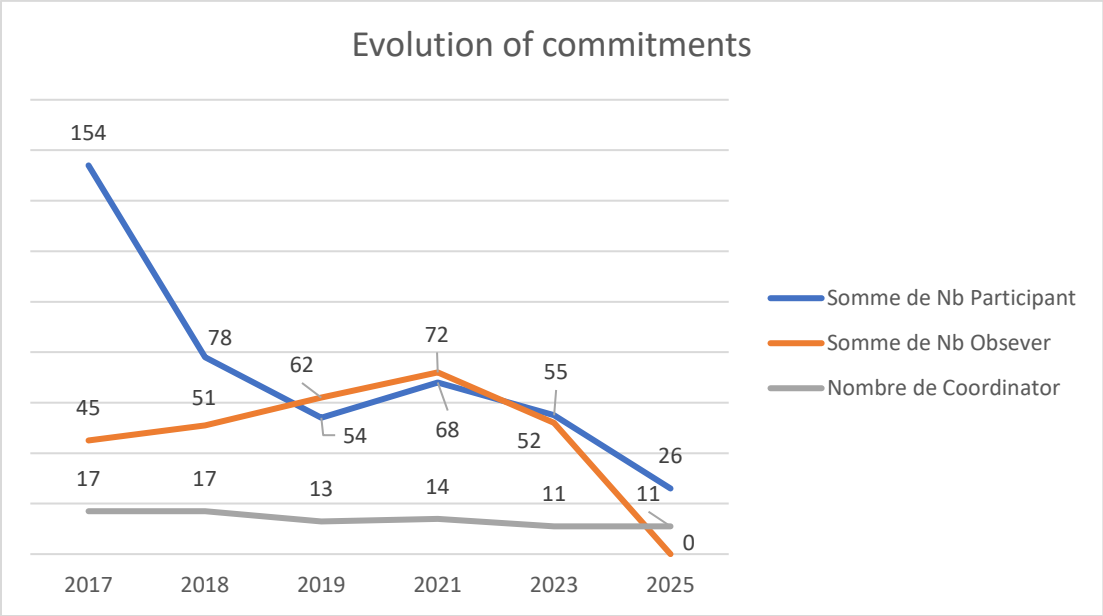
Trends

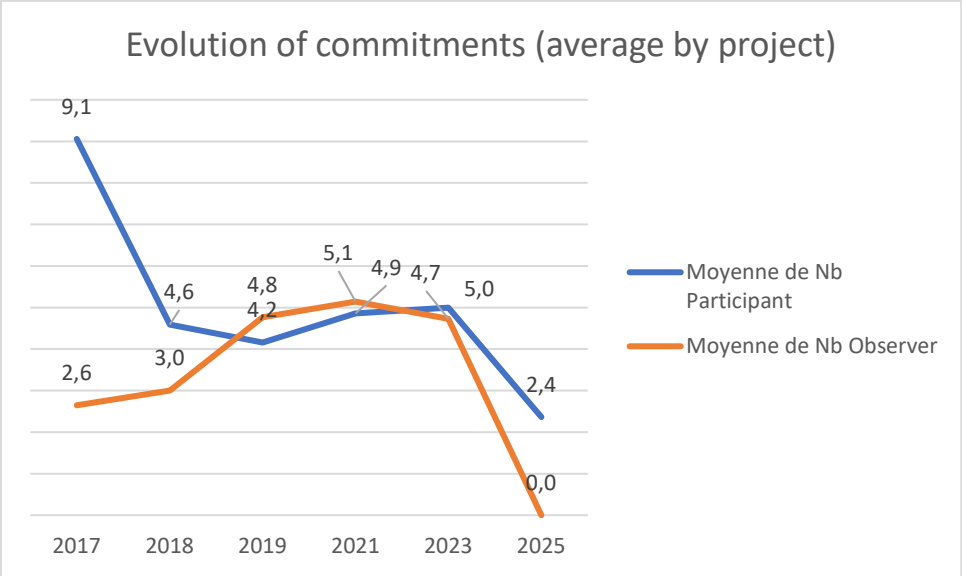


Trends in the number of projects launched. The number of projects launched is decreasing. A recurring theme in discussions between States was precisely the number of projects launched, which seemed too high to allow effective progress to be made on all of them. However, the link between the number of projects and progress is difficult to substantiate empirically, as States' commitment is certainly variable but relatively low even in the projects in which they are involved.



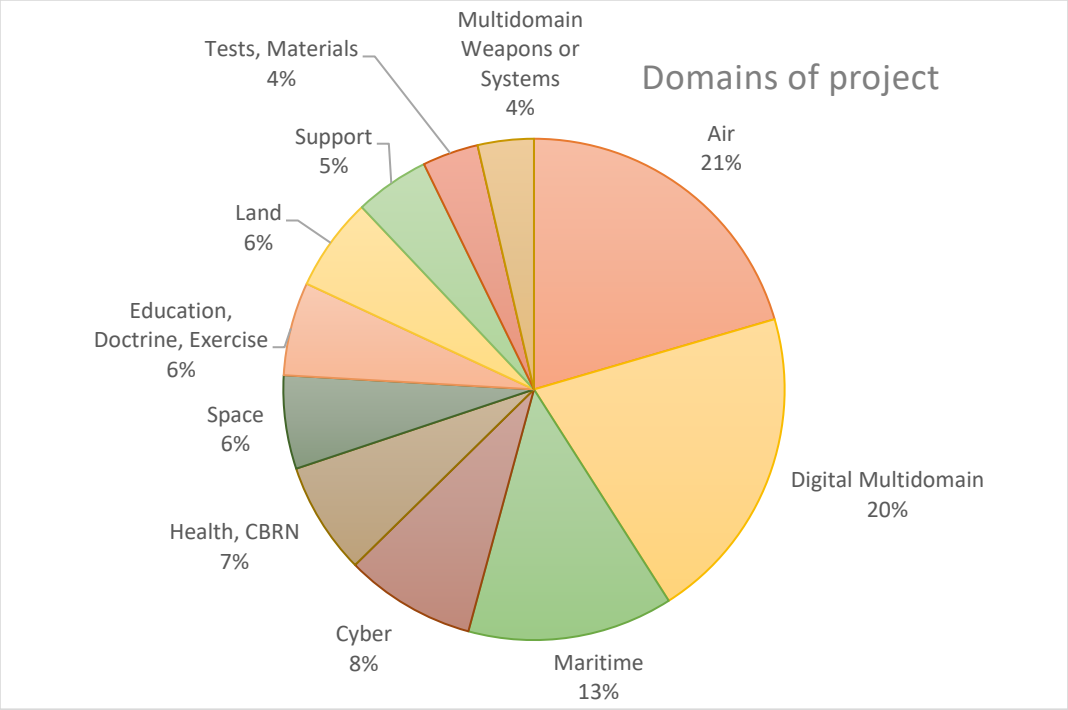
Trends in the type of projects. Although the number of Needs and R&D projects is relatively stable, it is increasing proportionally. The disappearance of operational structure projects can be explained by the difficulty of setting up such projects within the framework of PESC (difficulty of subsequently incorporating the structure into a pre-existing multilateral forum, difficulty of imposing on all States a new structure created simply for a few, etc.). The PESCO-EDF link seems to be well established in practice, even if the issue of empty projects remains significant.





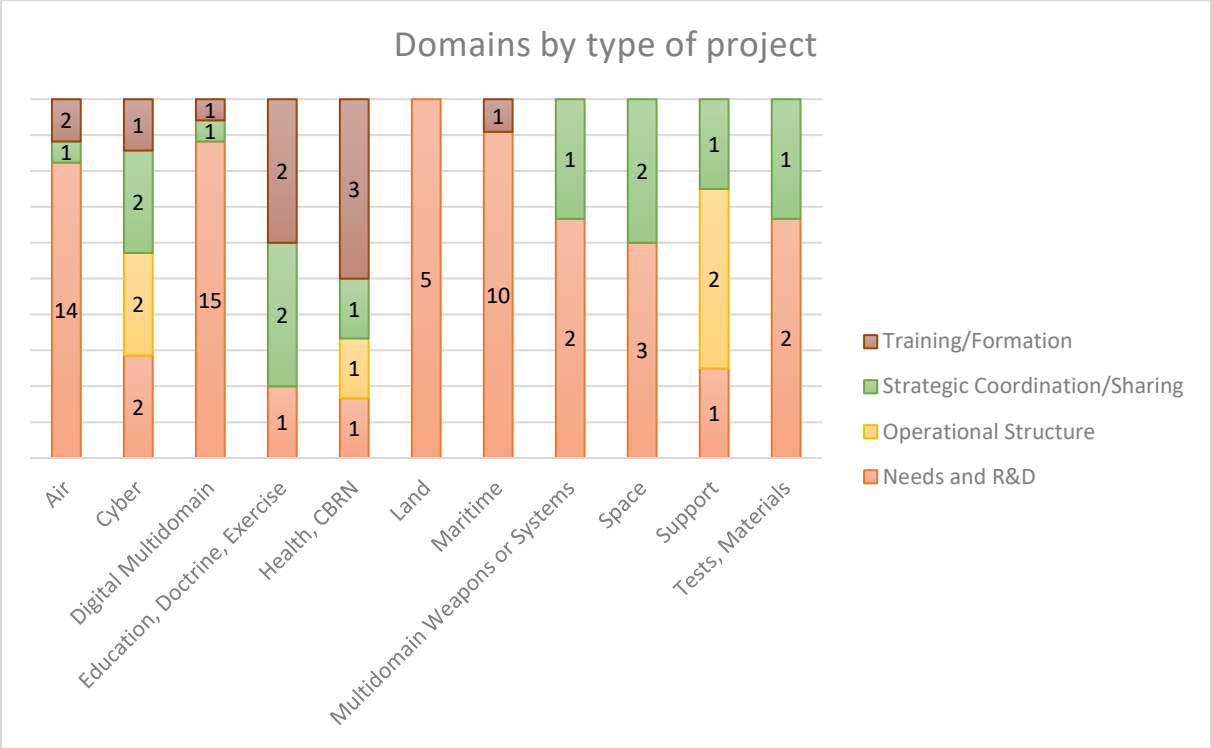
Trends in Member States' commitment. Not only is the number of projects declining, but so too is Member States' commitment to them. Observer status is no longer even considered attractive in 2025. The average participation rate for that year is 2.4... bearing in mind that many States wanted to set a minimum of three States to launch a project during the last strategic review of PESCO (and that the figures in these statistics consider the coordinator to be a participant).

Domains

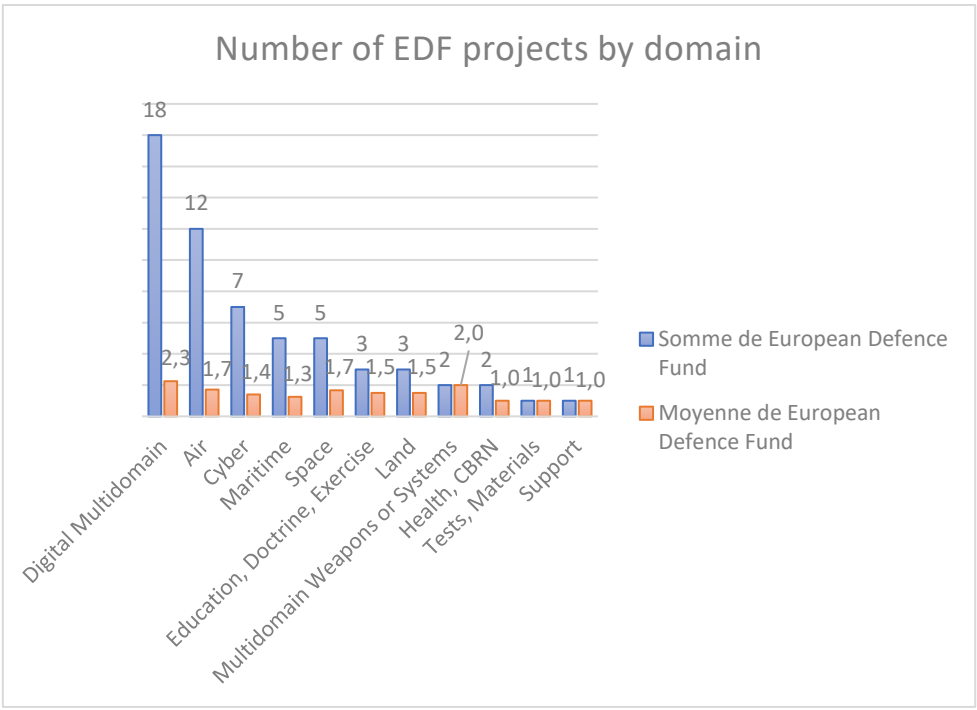


Project domains. Two domains emerge as covering the main interests for coordinating States: air and digital multi-domain. However, looking at the graph above on progress by area, these

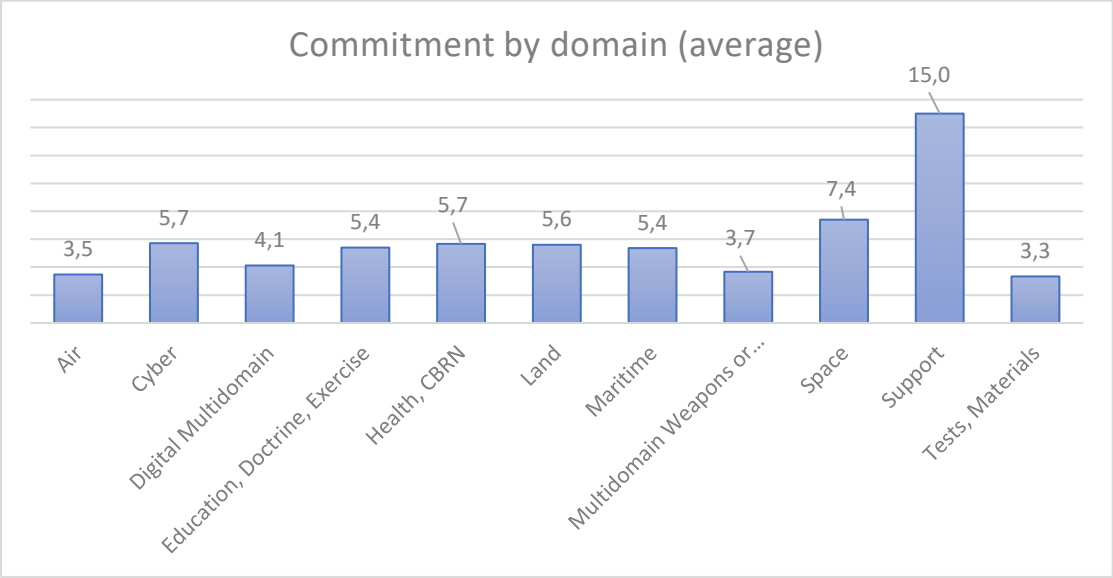
first two domains are among the three that are making the least progress. In these areas, many projects are created with a view to pre-empting a topic, including from the perspective of the EDF – as the next two graphs may indicate.



Type of projects by domains. No additional information to note compared to the previous graph.

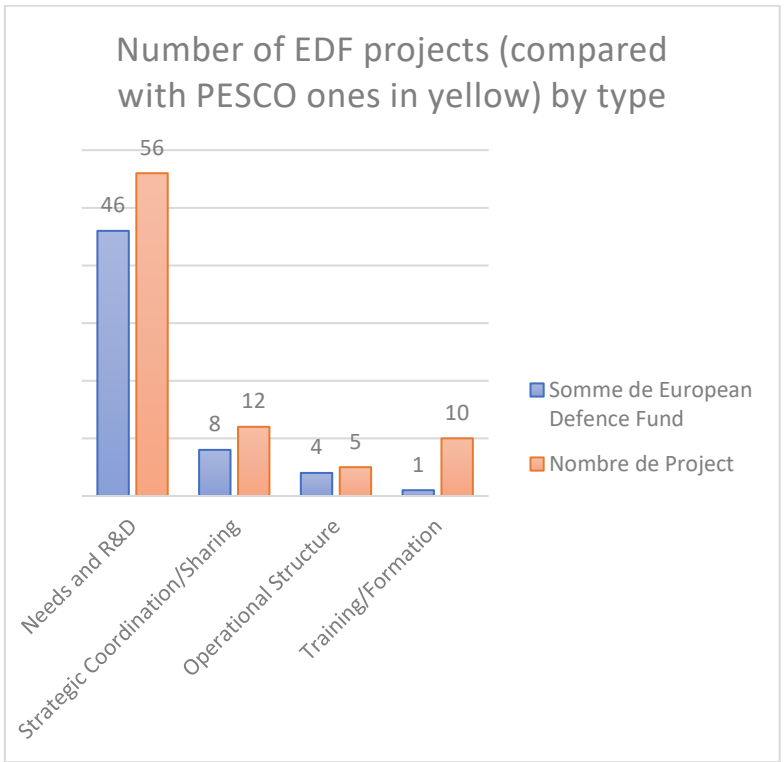


Number of EDF projects related to PESCO projects by domain. No additional information to note compared to the previous graph.

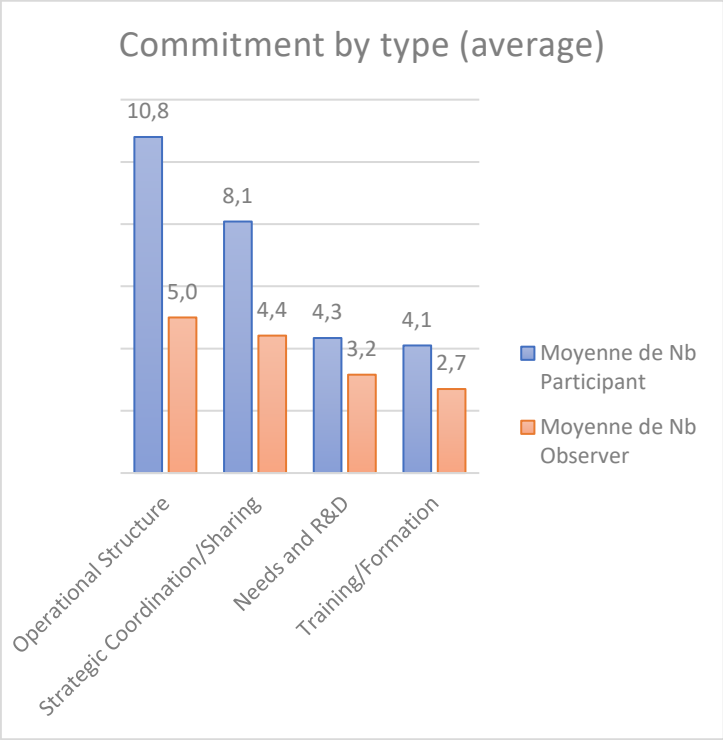


Commitment of States by domain. They are more involved in the Support domain (particularly military mobility) and less so in the domains mentioned above for their industrial challenges (aerospace, digital multi-domain, multi-domain weapon systems).

Types



Number of EDF projects related to PESCO projects by type. Unsurprisingly, Needs and R&D PESCO projects are the most closely linked to EDF projects.



Commitment of States by type of project. Operational structures attracted the most interest, although projects were few in number and concentrated in the early years of launch, which were also more conducive to commitment.

ANALYSIS OF THE STATE OF PERMANENT STRUCTURED COOPERATION AND LESSONS FOR THE FUTURE OF EUROPEAN CAPABILITIES

Background to Permanent Structured Cooperation

PESCO is a framework provided for by the Lisbon Treaty[3] but only became operational in 2017[4]. It enables Member States that are deemed "willing and able" to establish defence cooperation projects. The underlying rationale is to allow progress to be made within small coalitions of interested states, rather than requiring unanimity among all 27 Member States.

[3] Articles 42(6) and 46 (TEU).
[4] Council Decision (PESC), 11 December 2017: https://eur-lex.europa.eu/eli/dec/2017/2315/oj/eng

Beyond a limited number of basic rules[5], Member States retain broad discretion in determining the organisational arrangements of their cooperation. On an annual basis – biennially from 2020 onwards – Member States are invited to propose projects, present them to their counterparts, and seek participation from at least one additional state. The formal adoption of projects is then authorised by a Council decision. Since 2017, 83 PESCO projects have been launched, of which 74 are, at least theoretically, still active.

Two Strategic Reviews, conducted in 2020[6] and 2024[7] respectively, have led to adjustments in the functioning of PESCO.

Alongside the "project" pillar, PESCO also comprises a "governance" pillar, consisting of 20 binding commitments (in practice, objectives) that participating states are required to meet. Each year, national authorities complete a reporting matrix detailing their progress against these targets. Although the 2024 Strategic Review simplified this process, the administrative burden remains substantial. This governance pillar is largely responsible for the declining interest of national capitals in PESCO. While the original intention was to make PESCO a selective framework reserved for the most motivated states, nearly all Member States ultimately joined. The binding nature of the commitments has therefore produced the opposite effect, namely significant administrative fatigue.

Main Elements of Analysis

Before turning to the findings highlighted by the data, it is worth addressing the relevance of certain cross-references. Given (i) the frequent absence or ambiguity of publicly available information on project progress, and (ii) the fact that a substantial number of projects have either stalled or failed to advance meaningfully, some cross-referencing exercises are of limited analytical value. A project-by-project assessment is required to establish the actual state of cooperation. The analysis below therefore focuses exclusively on the most salient findings.

- **Declining Commitment**

The most striking observation is the pronounced decline in Member States' commitment to PESCO, both in terms of the number of projects launched and levels of participation. Notably, no state expressed an interest in joining the most recent wave of projects even as an observer.

[5] Council Decision (PESC), 25 June 2018: https://eur-lex.europa.eu/eli/dec/2018/909/oj
[6] Council Conclusions, 20 November 2020: https://www.pesco.europa.eu/wp-content/uploads/2020/12/2020-11-20-Council-Conclusions-on-PESCO-Strategic-Review-2020.pdf
[7] Council Conclusions, 18 November 2024: https://data.consilium.europa.eu/doc/document/ST-14375-2024-INIT/en/pdf

This clearly illustrates waning interest in the framework. PESCO no longer attracts the most ambitious cooperative initiatives originally envisaged. Major programmes such as the Future Combat Air System (FCAS), the Main Ground Combat System (MGCS), or, more recently, the European Long-Range Strike Approach (ELSA), have all been developed outside the PESCO framework.

This loss of attractiveness can be attributed to multiple factors, many of which are examined in the analysis that follows.

- **Slow Progress**

A second major finding concerns the limited – if not negligible – progress achieved by most projects. Only three out of 83 projects have reached their stated objectives. While it is acknowledged that cooperative defence projects typically require long lead times, it is nevertheless striking that, after several years, some initiatives remain at the stage of drafting project arrangements, i.e. defining objectives and governance structures.

In practice, most Member States have little incentive to invest political or administrative capital in PESCO projects. This may reflect shortcomings in project design, limited political will to cooperate, or the inherent resistance of military systems to organisational change – most likely a combination of all three.

Germany has closed the highest number of projects, although each reached a different level of maturity. France, when including the project it coordinated jointly with Sweden, is comparable, having closed three projects without tangible deliverables. The decision to close projects may reflect a degree of pragmatism: states are reluctant to keep initiatives formally open when meaningful cooperation proves unattainable. This is particularly evident in the French case. At the same time, it highlights the structural fragility of many PESCO projects, which are often initiated unilaterally by a single state without prior assurance of shared interests. This dynamic also explains why many projects remain narrow in scope.

Moreover, the frequently invoked assumption that cooperation is more effective among a small number of states is not borne out by the evidence. On the contrary, the level of commitment appears to depend less on the number of participants than on the genuine interest of the states involved and the quality of the coordinating state's proposal, including its governance model.

The case of Estonia merits particular attention. It appears to be the Member State whose projects have progressed the most, with one project already completed and three others relatively advanced. The Estonian approach, characterised by a limited number of projects,

clearly defined objectives, efficient management and proactive political communication, could therefore serve as a model within PESCO.

Finally, as a transition to the next section, it is noteworthy that approximately three quarters of PESCO projects linked to a European Defence Fund (EDF) project, none of which have yet been completed, show intermediate deliverables. This could suggest that PESCO functions as a strategic coordination forum between states overseeing industrial consortia responsible for implementing capability requirements. In reality, the situation is more nuanced. While all three completed PESCO projects were linked to EDF funding, two EDF-linked projects remain ongoing. Conversely, among the 13 PESCO projects linked to EDF actions that have produced no deliverables, the absence of tangible outcomes clearly demonstrates that the relationship between the two frameworks is neither standardised nor immune to instrumentalisation by states or industry.

- **The PESCO–EDF Link: The Core Issue**

An examination of the consequences of the link established between PESCO and the EDF sheds light on the deeper challenges of European defence cooperation – without implying that this link is their sole cause. The 2021 EDF Regulation provides that actions "developed in the context of a PESCO project" may benefit from an increased EU co-financing rate (an additional 10 percentage points)[8]. The original intention was to connect the expression of harmonised military requirements within PESCO to industrial development, thereby reducing the funding of projects disconnected from operational needs. In doing so, Member States sought to consolidate the initial stage of a coherent European capability development process.

In practice, however, this incentive has produced perverse effects. Rather than strengthening PESCO as a forum for strategic coordination, including oversight of industrial development, the link has encouraged states to create PESCO projects ex post to match EDF-funded topics. PESCO projects have thus often been established to secure higher EU co-financing for EDF actions, rather than to coordinate stakeholders or structure capability development. In this sense, many PESCO projects function as empty shells, labels applied to EDF projects without genuine cooperative substance.

This distortion has been further exacerbated by the fact that industrial actors were able to claim a link to a PESCO project in their EDF proposals without systematic verification by the Commission. The 2024 PESCO Strategic Review sought to correct this by requiring the

[8] EDF Regulation, Article 13, paragraph 3 (a): https://eur-lex.europa.eu/eli/reg/2021/697/oj/eng

Commission to ask Member States to formally confirm the existence of such links[9]. While well intentioned, this measure is unlikely to prevent artificial linkages agreed upon between states for financial reasons.

This dynamic may partly explain the growing proportion of "Needs & R&D" projects across successive PESCO waves, as well as the overall lack of substantive progress, particularly in capability development. Ultimately, responsibility for these shortcomings lies primarily with the Member States themselves. PESCO, as one of the least constraining cooperation frameworks available, reveals the limited political appetite for genuine defence cooperation.

PESCO Is Dead – Long Live PESCO?

The European Defence Industry Programme (EDIP), adopted on 16 December 2025, has no substantive institutional link with PESCO[10], aside from a provision stating that European Defence Projects of Common Interest (EDPCIs) must "take account of" cooperation within PESCO – a formulation that remains weak. Nevertheless, EDIP introduces two potentially transformative instruments: EDPCIs, designed as large-scale industrial projects, and the Structure for European Armament Programmes (SEAP), which provides programme management and facilitation. Both are eligible for EU funding.

This raises the question of PESCO's future role, particularly in capability development. Without radical reform, participation in PESCO projects appears to offer limited added value. This need not, however, be detrimental to European defence cooperation as a whole. If EDIP enables more effective industrial and capability collaboration, it may represent a net gain. In such a scenario, PESCO could refocus on operational cooperation – although this would still require a substantial overhaul of its framework.

One key lesson from the PESCO experience is clear: without instruments that genuinely facilitate cooperation, states are reluctant to engage. PESCO failed not because cooperation was impossible, but because it was no easier within the framework than outside it. Crucially, this failure does not lie with PESCO as such, but with the Member States, which chose not to endow it with meaningful facilitating mechanisms. Instead, they have constructed a fragmented European capability process, with limited interdependence between its components.

By contrast, SEAPs may demonstrate that a framework accompanying a programme throughout its lifecycle – particularly when combined with funding – can effectively support

[9] Quoted above: https://data.consilium.europa.eu/doc/document/ST-14375-2024-INIT/en/pdf
[10] EDIP Regulation: https://eur-lex.europa.eu/eli/reg/2025/2643/oj/eng

cooperation. Whether this will ultimately challenge the existing European capability architecture remains to be seen.

Finally, the shortcomings of PESCO should not be interpreted as evidence of the failure of intergovernmental cooperation per se. The EDF has yet to deliver significant operational outcomes, nor has the European Commission demonstrated a clear capacity to lead defence cooperation on behalf of Member States. Moreover, defence capabilities developed through any framework are ultimately fielded by national armed forces, making their involvement indispensable. Strengthened supranational mechanisms cannot compensate for a lack of political will among states.

A more effective balance between intergovernmental and EU-level cooperation therefore remains to be found. The long-standing marginalisation of the European Defence Agency (EDA) illustrates this challenge. The decision taken by the European Council in December 2025 to strengthen the EDA may contribute to restoring this balance in the years ahead[11].

CONCLUSION

PESCO has failed to deliver the level of defence cooperation initially anticipated. Like the EDA before it, it has not been endowed by Member States with the means required to effectively facilitate cooperation. PESCO should therefore be understood as a symptom rather than a cause of the persistent difficulties states face in engaging in voluntary defence cooperation. While an intergovernmental framework for capability cooperation remains relevant, PESCO will require profound reform if it is to fulfil this role.

[11] Council Conclusions, 19 December 2025 : https://data.consilium.europa.eu/doc/document/ST-24-2025-INIT/fr/pdf

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