



Sahaidachnyi  
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# UKRAINIAN DEFENCE ASSOCIATIONS OVERVIEW

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In 2022-2025 Ukrainian defence industry has been going through profound transformations and entered a consolidation phase. From [a volunteer run R&D](#), uncoordinated initiatives to forming clusters, alliances and industry associations. This process reflects a transition from reactive defence innovations to strategic industrial development.

A number of defence companies and clusters naturally branched out of the existing IT-ecosystems. For example, **Diia.City United** and **Technosystem** formed new defence streams. In parallel, entirely new organizations **Tech Force UA** and **Iron Cluster** appeared. The first association of associations **Ukrainian Council of Defence Industry** “**Zbroyary**” was formed in 2025; it unites various associations and military manufacturers, institutionalizes the sector bringing it closer to the familiar model among the partners.

**The Ukrainian defence sector is characterized by rapid growth and transformation from mostly a government monopoly to the industry run by private companies.**

2022 —————→ 2025



1200+  
companies

€50M  
invested (2024–2025)



60%  
private sector

\$3–5bln  
export potential

1/3

of all CEE defense  
innovators — in Ukraine.  
Fastest  
field-to-deployment

## Defence industry evolution

Ukraine is forming a new European defence production architecture – horizontal, technological and open to partnerships. The sector faces a strategic challenge to move from “explosive growth” to systemic coordination. Various association and cluster development becomes a decisive factor of institutionalization. They ensure a smooth communication between the private and public sectors, as well as the integration of Ukrainian manufacturers into international security supply chains and consolidation of Ukraine’s status as a regional defence technologies innovation hub.

- ▶ **2014–2016** – first “military innovation” stage born through volunteer initiatives, horizontal networks, in particular, DIY drones and surveillance systems production. Created by small teams, startups, or volunteers from readily available off-the-shelves components, rather than in large factories. Advantages: fast, cheap, adapted to the front. Risks: less reliability, lack of standards, cyber threats, more difficult scaling. During this period, the state took first systemic steps aimed to increase defence sector transparency and efficiency.
- ▶ **2016–2021** – key transitional period from a closed state monopoly to a hybrid market-based model. The state worked on a legislative framework for the private military industry adoption, the first clusters, private companies R&D creation. In 2020 the “On Defence Procurement” law was adopted. It simplifies private capital access to the state defence order. It turned private companies from secondary goods suppliers into full-fledged arms market participants.



- ▶ In **2021** a new law “On Peculiarities of Reforming Enterprises of the State-Owned Defence-Industrial Complex” was adopted to change “Ukroboronprom”, massive state owned defence conglomerate to the Joint-Stock Company. This introduced corporate governance principles and created a Supervisory Board with independent members.
- ▶ The year **2022** became the point of no return – defence technologies became not only a military, but also an economic driver of Ukraine. The state funding for defence procurement has increased approximately 9 times compared to 2021. The first steps to create the Defence Industrial Complex Development Fund have been implemented.
- ▶ **After 2022**, the sector growth accelerated – from a small batch production to a corporate model, from individual initiatives to associations, accelerators and clusters. Most startups in the defence technologies/miltech appeared after 2022 in response to the battlefield urgent needs and Russia’s numerical superiority. Nearly three-quarters were founded or shifted to defence technologies after the full-scale invasion.



## Ukrainian Defence Associations

### Brave1

Public-private coordination cluster/platform for the Defence Tech in development launched in 2023. The platform supports startups, R&D teams and enterprises in the fields of unmanned systems, artificial intelligence, EW, robotics, cyber security and software.

🔗 <https://brave1.gov.ua/>

### Dii.City United («Defence Tech and Dual Use Stream»)

Tech business association of prominent IT companies and investors that added a defence stream in 2025.

🔗 <https://diacityunited.org/>

### IRON Cluster

A defence technology hub based in Lviv, created in 2023 that brings together companies, startups, and investors to develop high-tech solutions for the military. The IRON Cluster is working to build an innovative ecosystem that connects R&D teams, manufacturers, and government customers.

🔗 <https://ironcluster.org/>



## NAUDI (National Association of Ukraine Defence Industries)

An association created in 2020 to unite leading Ukrainian manufacturers of military and dual-use equipment, weapons, and ammunition.

 <https://naudi.com.ua/uk>

## Tech Force Ukraine (TFUA)

Is an alliance of leading Ukrainian private defence manufacturers created in 2023. Its mission is to advance Ukraine's technological capabilities, particularly in defence, by uniting private arms producers.

 <https://techforce.in.ua/>

## UCDI "Zbrovary" (Ukrainian Council of Defence Industry)

An association of associations created February 2025, where each member represents dozens or even hundreds of enterprises across various segments of the defence sector.

 <https://ucdi.org.ua/>

### Founding Members of the UCDI:

**ARMADA (Association of Manufacturers of Unmanned Systems and Associated Technologies)** – association that unites leading companies in the development and manufacturing of unmanned systems (UAS) and related technologies for military, agricultural, and other sectors. Officially registered as a legal entity in 2025.

 <https://www.armada.net.ua/>

**Association of Manufacturers of EW/ELINT** – a civic organization that consolidates the private defence industry in Ukraine for more effective interaction with the government and international partners. It was launched in February 2025 as part of the UCDI.

**Defence Alliance of Ukraine** – founded in 2023 the alliance aims to create a collaborative network of Ukrainian and international defence companies to localize weapons and military equipment production.

 <https://defencealliance.org.ua/en>

**League of Defence Enterprises of Ukraine** – a non-governmental organization registered in 2017 that brings together defence companies to promote products and cooperation.

 <https://ldc.org.ua/en/>

**Technosystem** – The "Techosystem" civic union was founded in July 2022. In 2023, the organization strengthened its defence-related activities, becoming one of the key hubs for consolidating Ukraine's technology ecosystem. It is a civic association that unites representatives of the Ukrainian tech sector.

 <https://techosystem.com.ua>

**Ukrainian Robotics Forces** – association founded in 2024 to coordinate, lobby and develop the robotic systems industry further.