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Public Summary
Strategic Technologies and Defense Security Cooperation

Department of War
OFFICE OF PREPUBLICATION AND SECURITY REVIEW

Strategic evaluations of security cooperation (SC) programs are conducted pursuant to 10 U.S.C. § 383, which states that the Secretary of War shall “maintain a program of assessment, monitoring, and evaluation in support of the [SC] programs and activities of the [Department of War (DoW)].” The Office of the Deputy Assistant Secretary of War for Security Cooperation (ODASW(SC)) commissioned the Center for Naval Analyses (CNA) to evaluate the effectiveness of DoW SC efforts in advancing strategic goals for defense-related research and development, specifically for critical advanced technology.

Background. CNA analyzed the relationship between defense innovation and partnership building as it relates to areas of critical advanced technologies and assessed the policies and practices that shape U.S.-ally science and technology (S&T) collaboration and technology transfer. CNA employed case study analysis using examples from the U.S. European Command and U.S. Indo-Pacific Command areas of responsibility to highlight the factors that influence real-world cooperation. This summary provides unclassified primary findings, conclusions, and recommendations derived from CNA’s evaluation report.

The strategic evaluation focused on two primary research questions:

1. What are the strategic and policy implications of, and lessons from, existing and emerging international defense innovation relationships?
2. How can these implications and lessons inform reforms or streamline the research, development, test, and evaluation process for a more effective approach to international engagements on strategic, emerging, and disruptive technologies?

Methodology. CNA’s research incorporated unclassified and classified official guidance, policy documents, and memoranda; government and private research organization studies and reports; and discussions with U.S. and partner nation officials and experts. Partner nations selected for the case studies were based on criteria that the partners were: considered to be a strategic partner; having an advanced economy; maintaining defense innovation spending similar to the United States; having institutionalized and routinized S&T engagement with the United States; and the existence of cross-cutting innovative firms, startups, and institutes.

Key Findings. CNA presented the following findings related to national spending on defense innovation and the scale of U.S.-partner agreements:

- Traditional acquisition priorities can serve as barriers to international engagement on innovation, which is vital to help the DoW pursue national security objectives overseas.
- Due to the critical nature of defense S&T initiatives, the protections in place to prevent technologies from getting into an adversary’s possession also slow cooperation between close allies.

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- Cooperation is aided by personal relationships and senior-level impetus, although initiatives in recent years have sought to introduce more institutionalized practices.
- Major challenges include export control concerns, partner industrial policy priorities, intellectual property concerns, classification challenges, U.S. reluctance to share information and capability gaps, and geopolitical dynamics.
- Best practices modeled include senior-level support and investment in initiatives, complementary strengths, governance mechanisms for S&T collaboration, standards in multilateral fora, and routinized levels of investment.

CNA Recommendations.

- **Assess** whether current DoW personnel practices for classification and control markings match overarching intent by strategic guidance and existing classification guidance.
- **Revise** Department of Defense (DoD) Manual 5200.01, “DoD Information Security Program: Overview, Classification, and Declassification,” to stress extant guidance on the limited applicability of the distribution caveat “not for release to foreign nationals” to nonintelligence information.
- **Consider** requiring justification within established/codified international programs for the application of Controlled Unclassified Information markings.
- **Initiate** an annual review of extant actors and agreements with select allies in relation to overarching DoW objectives and SC goals with those partners.
- **Ensure** that the country-specific SC sections of each combatant command campaign plan (or theater campaign plan) include overarching S&T objectives that align with strategic priorities. The inclusion of these objectives will ensure greater alignment between SC and S&T goals, planning, and activities.
- **Explore** the value of bilateral investment pools that can target early-stage technologies of mutual interest to the United States and partners.

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