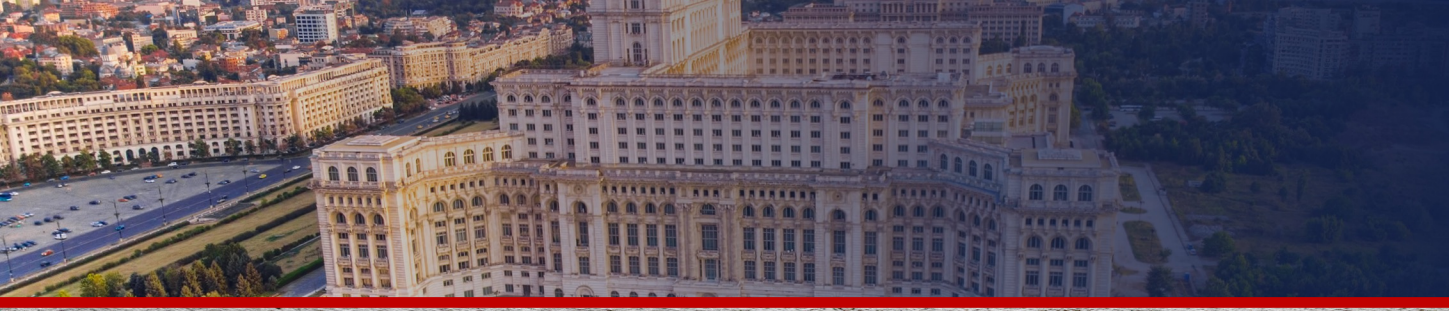


Europe & NATO CONFERENCE

ISOA

How the Private Sector Can Partner with Romania as a Regional Defense Hub



Europe & NATO CONFERENCE

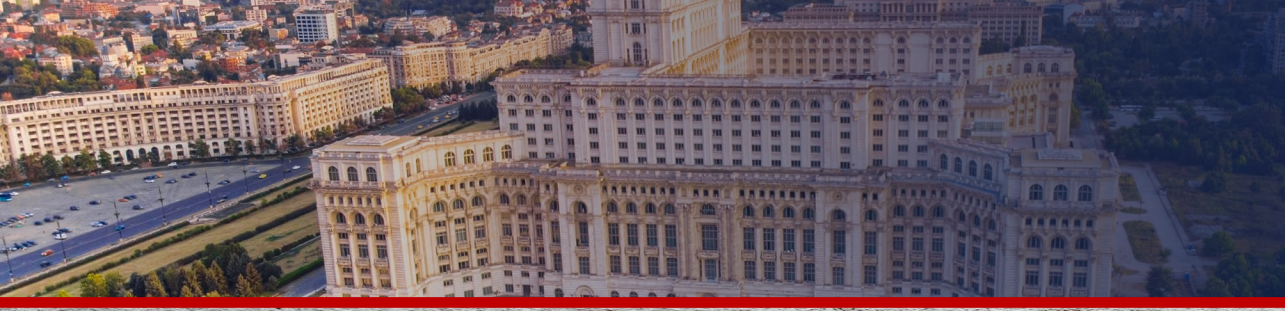
ISOa

Why Romania, Why Now?

UT EST RERUM OMNIUM MAGISTER USUS

TURNBULL SERVICES





Europe & NATO CONFERENCE

ISOA

GTI

Fast Facts

17 CITIES IN
10 COUNTRIES

6 BRAND NAMES

23 COMPANIES

600+ EMPLOYEES

EST.1992
Odesa, Ukraine

USD 190 MILLION
TURNOVER IN 2024

OWN SOFTWARE

70 TRUCKS

OWN FACILITIES



Europe & NATO CONFERENCE

ISOA



Claudiu Vuta

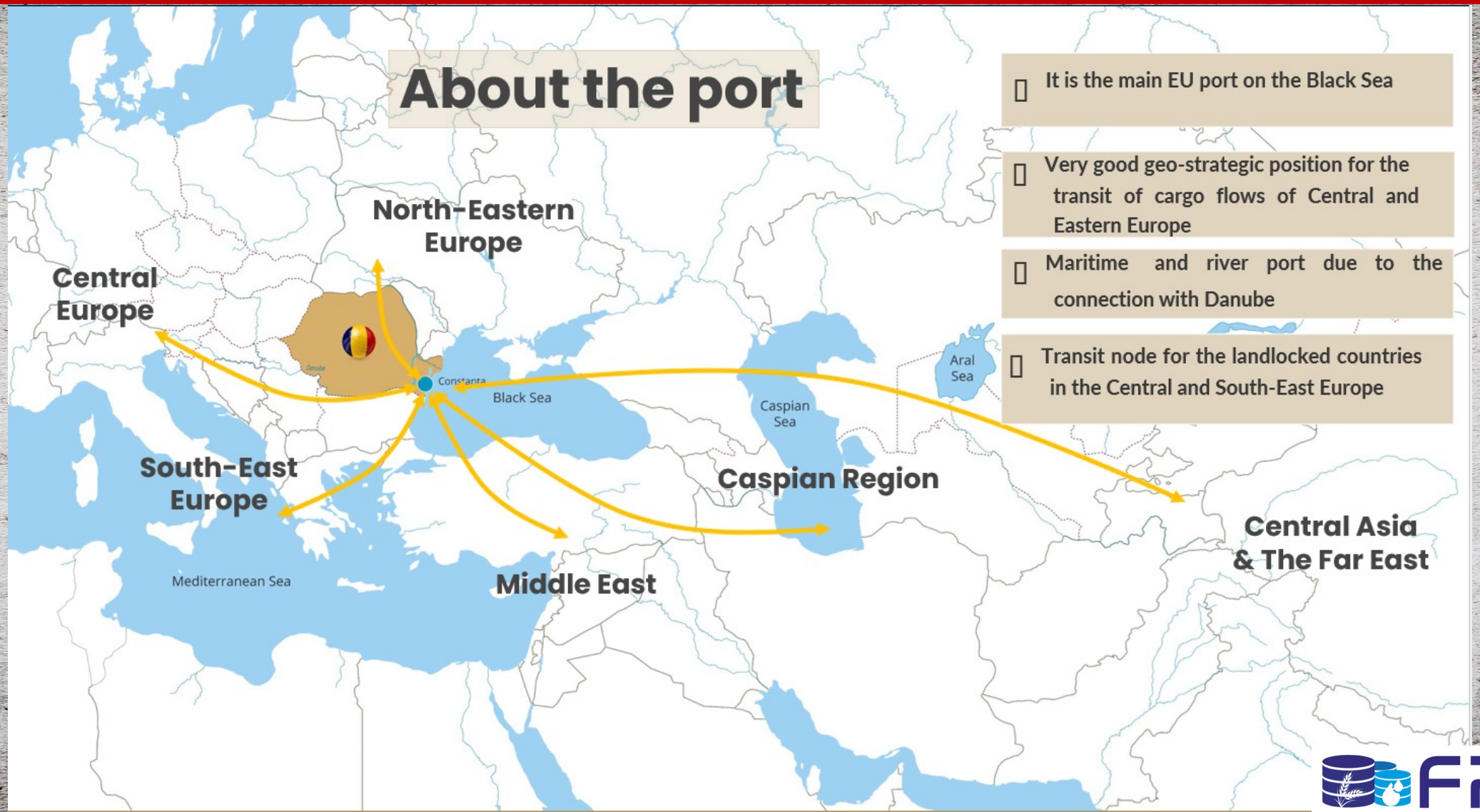
Commercial Director, FRIAL SA



Europe & NATO CONFERENCE

About the port

- It is the main EU port on the Black Sea
- Very good geo-strategic position for the transit of cargo flows of Central and Eastern Europe
- Maritime and river port due to the connection with Danube
- Transit node for the landlocked countries in the Central and South-East Europe





Europe & NATO CONFERENCE

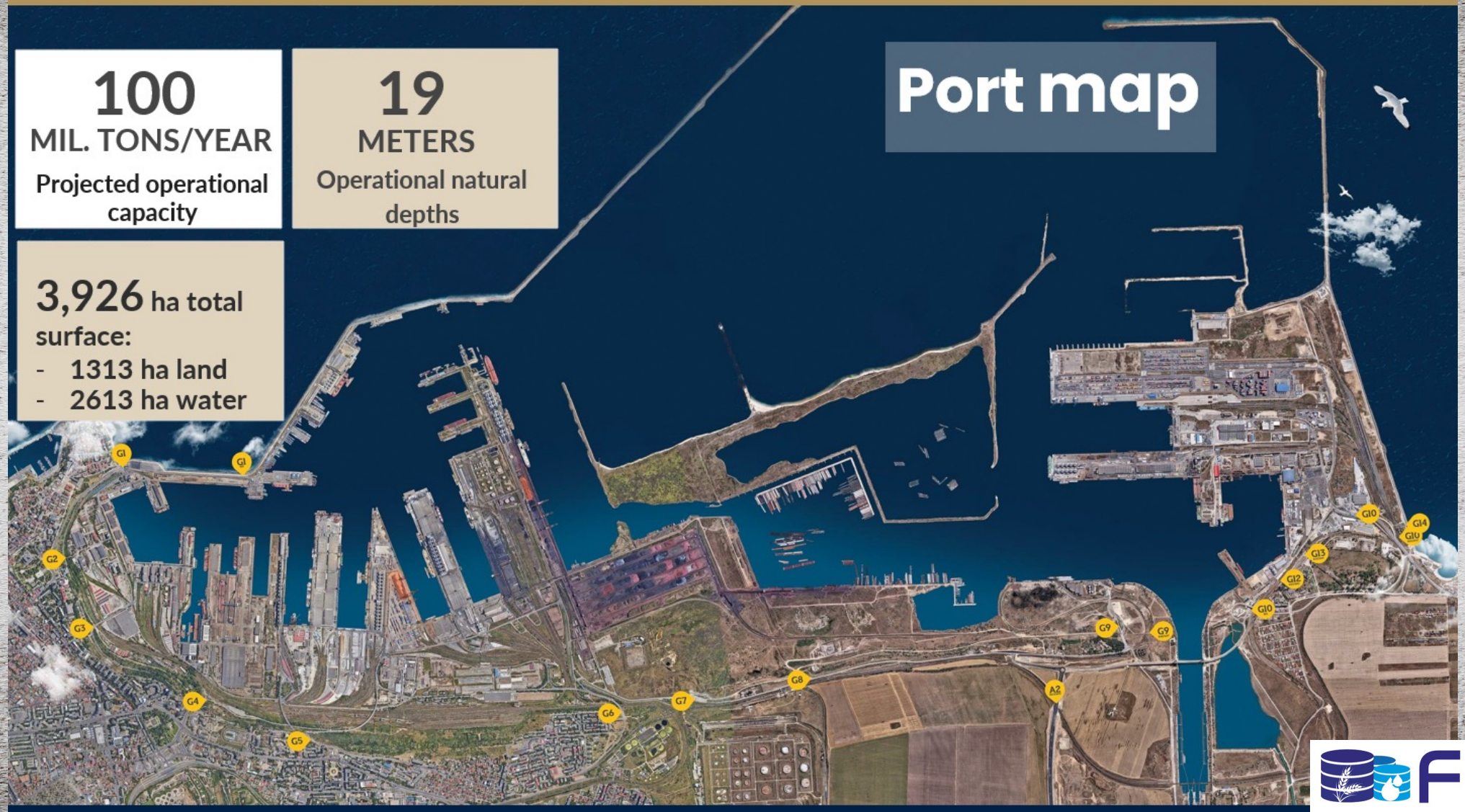
ISOa

Port map

100
MIL. TONS/YEAR
Projected operational capacity

19
METERS
Operational natural depths

3,926 ha total surface:
- 1313 ha land
- 2613 ha water



FRIAL



Europe & NATO CONFERENCE

ISOa

Port facts

38
PORT OPERATORS

100
FORWARDING COMPANIES

APPROX.
700
are performing activities every day

APPROX.
12,000
employees working within the port

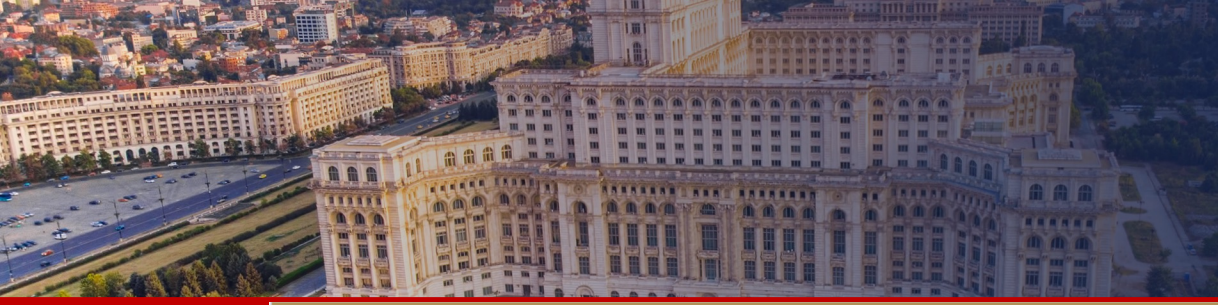
12
AGRI-BULK TERMINALS

2 mil. tons
STORAGE CAPACITY

GRAIN
HUB
for Romanian, Serbian and Hungarian crops



FRIAL



Port connections

Constanța Port has connections with all the modes of transport:

ROAD

Direct connection with A2 Highway to Bucharest

RAIL

Direct connection with the national rail network

PIPELINE

Direct connection with pipeline network

INLAND WATERWAYS

River Danube through the Danube-Black Sea Canal



Part of "Rhine-Danube" TEN-T Corridor



Europe & NATO CONFERENCE



Marius Ghiba

Founder & CEO, Interdiligence Consulting SRL



Europe & NATO CONFERENCE

ISOA

ROMANIA - GATEWAY TO EASTERN EUROPE

presented by

INTERDILIGENCE

STRATEGIC MANAGEMENT SOLUTIONS



Europe & NATO CONFERENCE

ISOA

Unique Value Proposition

INTERDILIGENCE



Romania = Gateway + Anchor + Opportunity

Romania as a regional hub for supporting neighboring countries and allies (e.g. Poland, Ukraine, Moldova)

STRATEGIC GATEWAY

Direct access to the **Black Sea** and to **regional partners** such as **Poland, Ukraine, Moldova.**

DEFENSE ANCHOR

Mihail Kogălniceanu Air Base is undergoing a **€2.5 billion expansion** to become **one of NATO's largest hubs in Europe**, to host around **10,000 permanent NATO troops** and act as a **major logistics hub** (by 2040).

OPPORTUNITY WINDOW

€16+ billion in EU-backed defense financing (2nd largest allocation in 2025) and new gov. pledges to boost defense spending to **2.2% of GDP**

MISSING LINK

A partner with local insight and on-the-ground fluency



Europe & NATO CONFERENCE

ISOA

Country Entry Key Facts

INTERDILIGENCE

INFRASTRUCTURE & LOGISTICS

Motorways (A1, A2, A3, A7)

- **A2 (206 km):** Constanța Port – Bucharest (completed)
- **A1 (580 km) + A3 (588 km):** Bucharest – Hungary (planned ~1,100 km; partially completed)
- **A7 (~450 km, under development):** Bucharest – Chernivtsi (Ukraine)

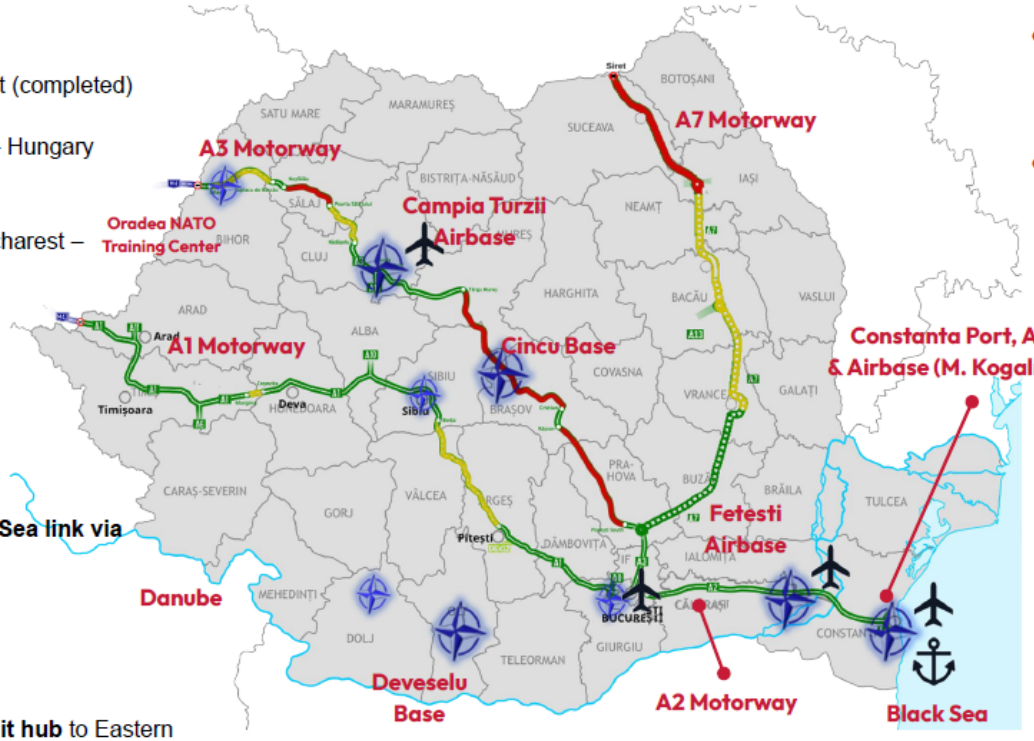
Constanța Port (largest Black Sea port):

- **~92.5M tonnes** handled in **2023**
- **Deep-water berths cargo vessels (up to 220,000 tonnes).**
- **Intermodal gateway: Black Sea–North Sea link via Danube–Rhine–Main waterway,**

  with EU rail & motorway access.

Bucharest Airport:

16M passengers (2024), major **military & transit hub** to Eastern Europe & Middle East



*Map of Romania and its main **Motorway projects** (**green** - **completed**, **yellow** - **under construction**, **red** - **under development**), NATO units/bases, airports and ports*

REGULATORY REQUIREMENTS

- **Complex Rules:** Transporting military or oversized cargo requires strict permits and licenses.
- **Local Help is Crucial:** Trusted local experts can streamline permits and avoid delays.

RISKS & OPPORTUNITIES

- **Complex Bureaucracy:** Represent hurdles, but also advantages for companies with local advisors.
- **Infrastructure Gaps:** Limited infrastructural resources present opportunities for development and innovative ideas.



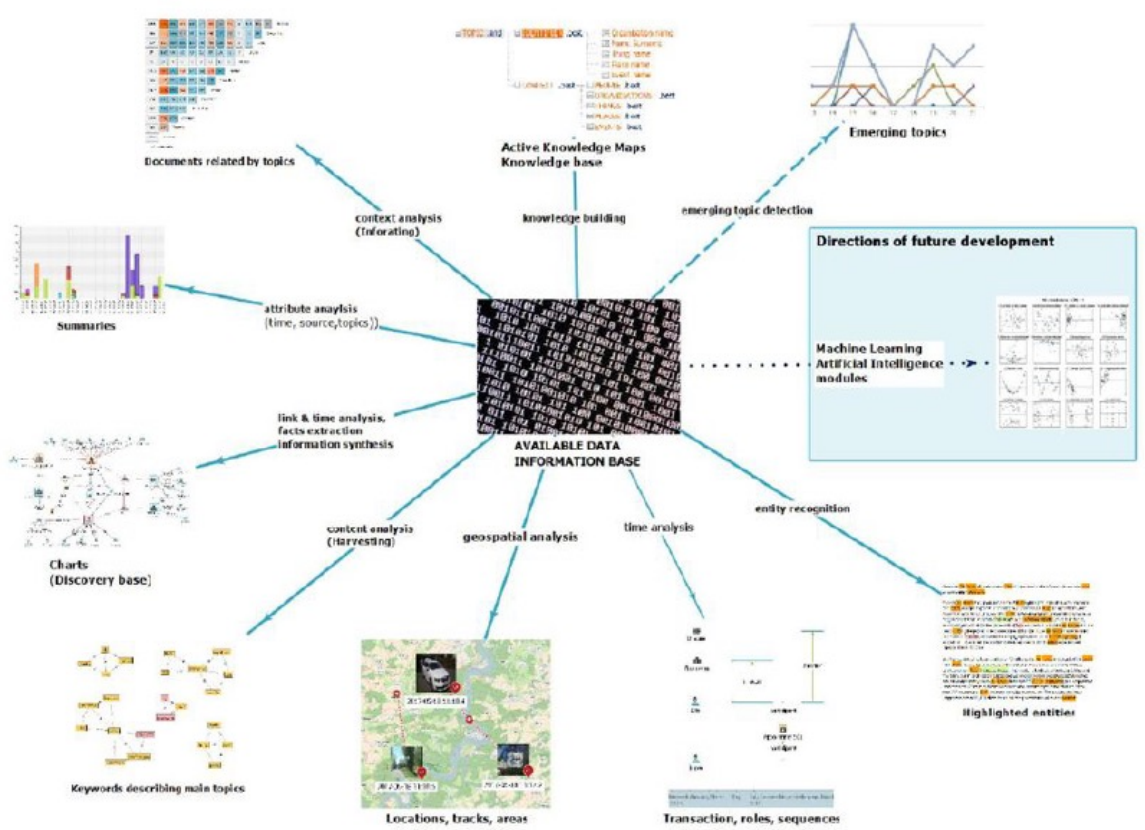
Europe & NATO CONFERENCE

ISOA

Market Navigator

YOUR GUIDE THROUGH COMPLEXITY

INTERDILIGENCE





Clarity: decode local laws, permits, and incentive programs.

Connections: credible local presence is crucial (Romanian stakeholders value on-the-ground commitment).

Competitiveness: consider local & regional competition with data-driven insights: e.g. tenders history on gov and EU funding.

Confidence: entry plan through a risk matrix mapping out potential pitfalls, and a strategic playbook

We turn uncertainty into opportunity.

www.interdiligence.com



Europe & NATO CONFERENCE

ISOA

INTERDILIGENCE

24/7

PHONE
+40 731 837 448

ADDRESS
41-43 Ana Davila Street,
Sector 5, Bucharest,
Romania

E-MAIL
contact@interdiligence.com

WEBSITE
www.interdiligence.com



Europe & NATO CONFERENCE

ISOA



Bryan Jardine

Managing Partner of the Bucharest office, Wolf Theiss



Europe & NATO CONFERENCE

WT

Europe and NATO Conference 2025

Strategic Entry into Romania's Defense Sector: Private vs. Public Partnerships

Bryan Jardine, *Managing Partner Wolf Theiss Romania*
bryan.jardine@wolftheiss.com

Romania's Defense Industry Landscape



Increased Defense Spending

Romania is continuously increasing defense, planning to increase the defense budget from 2.5% in 2025 to a potential 3,5% of GDP by 2030 with the money dedicated to effective military spending. An additional 1.5 per cent of GDP is earmarked for related investment, such as strategic infrastructure and cyber-security.

Modernization and Self-Reliance

The country is modernizing its military infrastructure and reducing dependence on foreign defense imports.

Opportunities for Foreign Investors

Romania seeks international partnerships focusing on technology transfer and long-term collaboration in defense.

Strategic Industry Transformation

Transition from fragmented legacy systems to a resilient, competitive defense industrial ecosystem.

WT Bryan Jardine, Managing Partner Wolf Theiss
E: bryan.jardine@wolftheiss.com, T: +40 722 568 569

Pros and Cons of Partnering with Private Companies



Advantages of Private Partnerships

Private firms in Romania offer agility and innovation, enabling faster decision-making and specialized defense technologies.

Specialized Capabilities

Focus on niche areas like drone technology, optics, and electronics enhances targeted defense projects.

Integration and Compliance Risks

Aligning with NATO standards poses integration risks, requiring thorough due diligence and co-investment support.

WT Bryan Jardine, Managing Partner Wolf Theiss
E: bryan.jardine@wolftheiss.com, T: +40 722 568 569

Pros and Cons of Partnering with State-Owned Enterprises

Strategic Advantages

SOEs control key infrastructure and offer direct access to government and EU/NATO defense contracts.

Facilitating National Integration

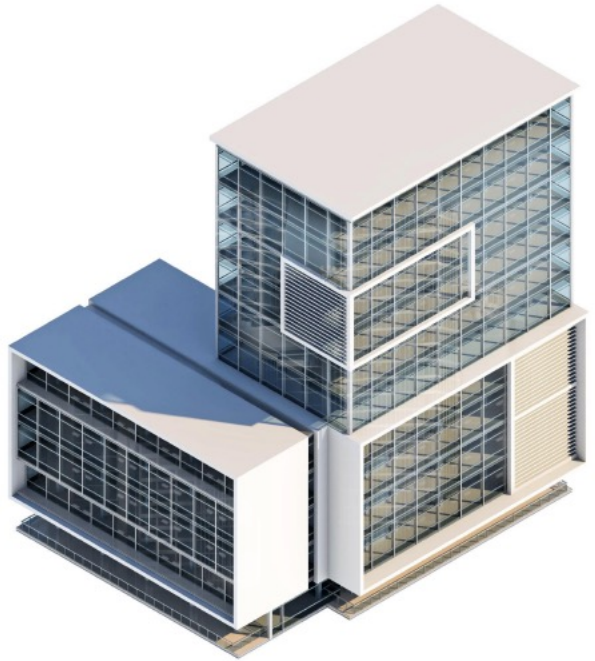
Partnerships with SOEs support offset obligations and integration into national defense strategies.

Operational Challenges

SOEs often face governance inefficiencies, political interference, and outdated infrastructure affecting performance.

Execution and Transparency Issues

Slow execution timelines and limited transparency are common due to bureaucratic processes in SOEs.



WT
Bryan Jardine, Managing Partner Wolf Theiss
E: bryan.jardine@wolftheiss.com, T: +40 722 568 569



Examples and Key Considerations

Notable Defense Partnerships

Otokar and Automecanica produce COBRA II armored vehicles through joint ventures in Romania's defense sector.

Technology Transfer and Local Production

Partnerships involve technology transfer and local manufacturing, strengthening the Romanian defense industrial base.

Key Success Factors

Successful ventures require clear governance, NATO compliance, alignment with national defense priorities, and scalable local partners.

Integration into Supply Chains

Investors should consider integration potential into European defense supply chains for sustainable growth.



WT
Bryan Jardine, Managing Partner Wolf Theiss
E: bryan.jardine@wolftheiss.com, T: +40 722 568 569



Identifying Key Risks

Political and Regulatory Risks

Government instability, procurement delays, and complex licensing processes challenge market entry in Romania.

Mitigation: Strong legal counsel and contract protections are essential to manage political risks effectively.

Financial Risks

Delayed payments, currency volatility, and limited capital access pose financial risks for private firms.

Mitigation: Escrow mechanisms, currency hedging, and co-financing with banks protect financial investments.

Operational Risks

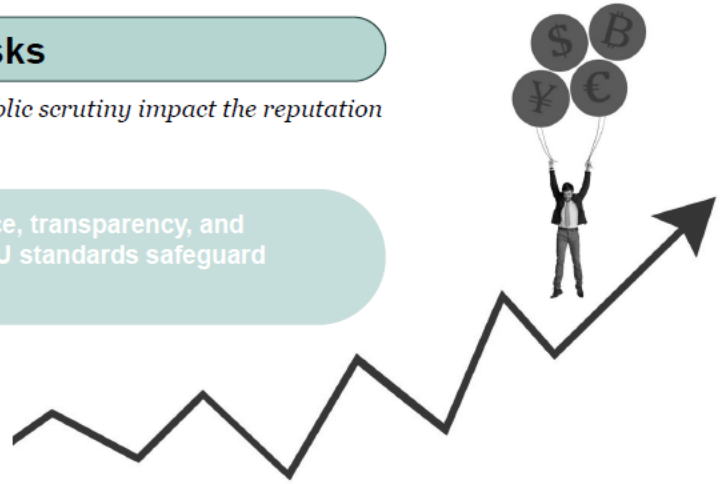
Outdated infrastructure and skilled labor shortages affect operational efficiency in the defense sector.

Mitigation: Investing in modernization and supplier diversification helps reduce operational risks in defense projects.

Reputational Risks

Corruption concerns and public scrutiny impact the reputation of defense deals in Romania.

Mitigation: Due diligence, transparency, and alignment with NATO/EU standards safeguard reputational risks.



WT
Bryan Jardine, Managing Partner Wolf Theiss
E: bryan.jardine@wolftheiss.com, T: +40 722 568 569

Final Recommendations

Partnership Models

Private partnerships can theoretically deliver innovation and agility; public partnerships ensure stability and strategic access.

Hybrid Strategy Advantage

Combining private and public models balances risks and benefits for optimal outcomes.

Investment Priorities

Focus on due diligence, local engagement, and NATO/EU standards alignment for success.

Growth Opportunities

Romania's defense sector growth offers significant long-term returns with strategic entry.



WT Bryan Jardine, Managing Partner Wolf Theiss
E: bryan.jardine@wolftheiss.com, T: +40 722 568 569



Reach Out for Further Discussion

Looking for insights and guidance on navigating Romania's defense sector provided by an expert partner? Contact me to further discuss:



Bryan Jardine

Managing Partner
4 Vasile Alecsandri Street, 011062
Bucharest, Romania

T: +40 722 568 569

bryan.jardine@wolftheiss.com



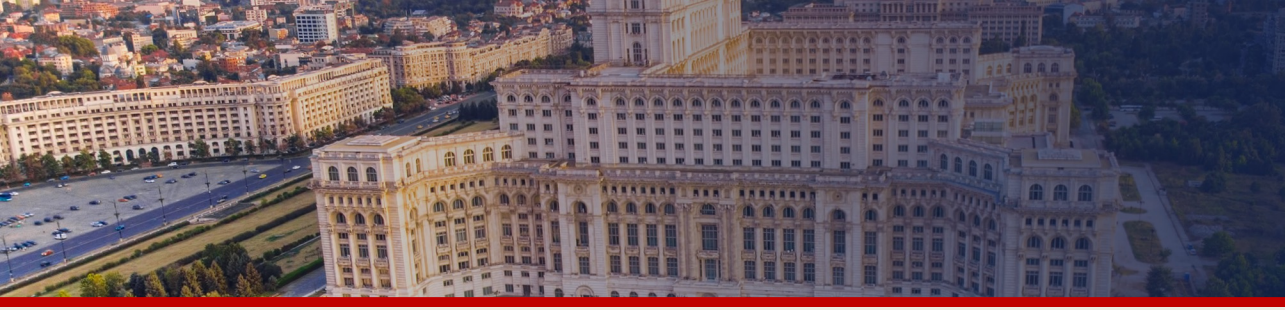
Europe & NATO CONFERENCE

ISOA



Michael A. DeForest

Founder & CEO, DeForest Group LLC, dba The DeFense Sales Academy



Defense Sales Academy / Defense Sales Coach

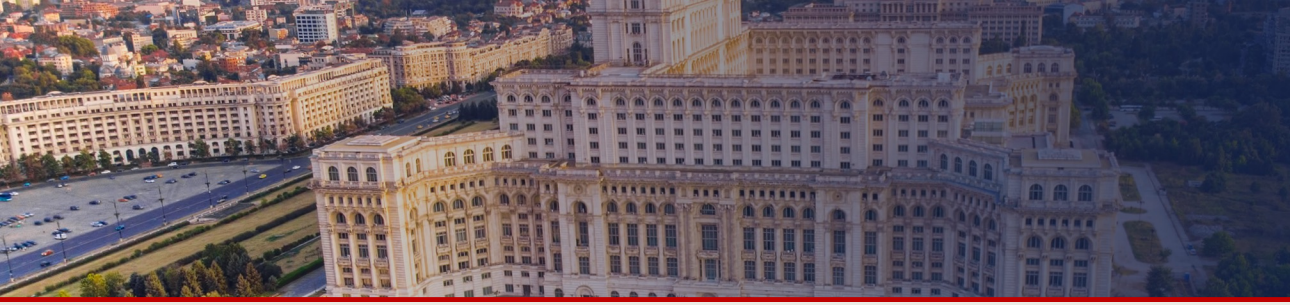
Romania blended academy track, workshops, labs & weekly deal clinics training host-nation teams on EU/NATO capture

- Immediate deliverables: capture plan; MEAT-aligned proposal skeleton; compliance matrix; SICAP tracker; partner/competitive map; risk register; red-team report; orals deck

- Governed & measured: export-control & security built-in; dashboard tracks compliant submissions, eval scores, win-rate & cycle-time

- Builds a professional BTG sales workforce trained to U.S. acquisition standards

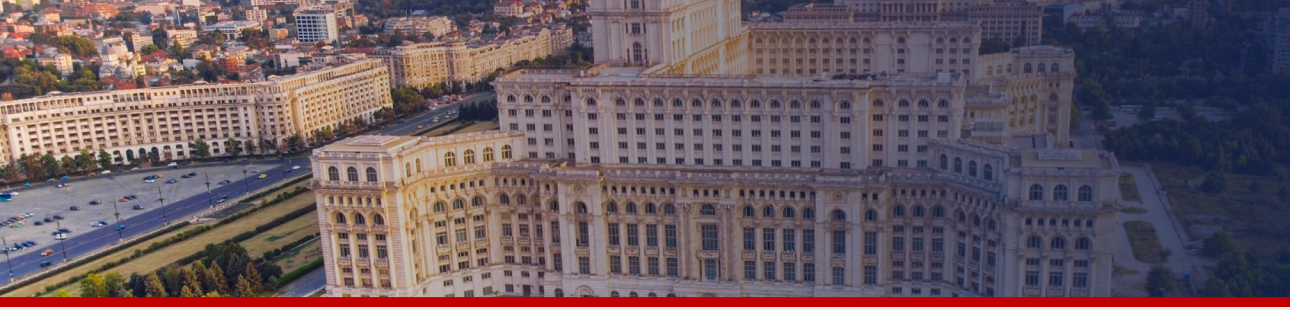
Michael A. DeForest, MBA | Founder & CEO, The DeForest Group, LLC defensesalescoach@gmail.com US: +1-678-227-4474 | EU: +48-881-943-199



Defense Sales Academy / Defense Sales Coach

- Provides AI-enabled BTG sales training and coaching
- Enhances NATO/ally interoperability through standardized defense sales education
- Reduces reliance on costly U.S. TDY deployments by training local/host-nation reps

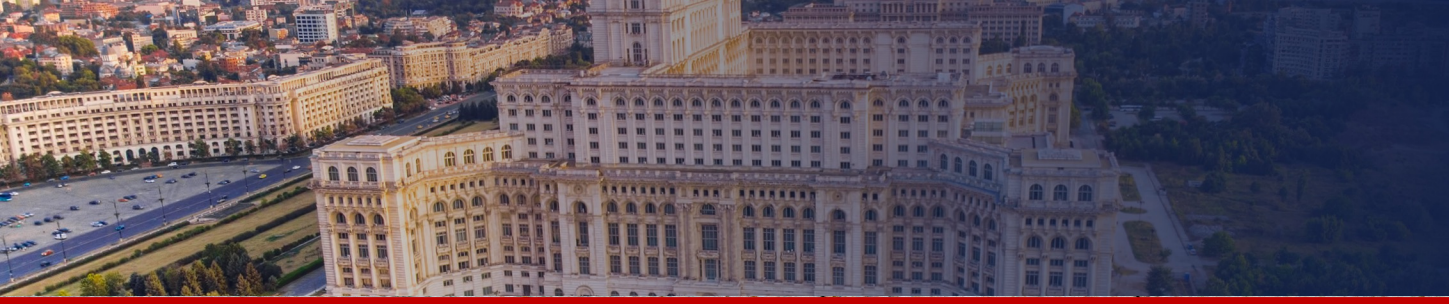
Michael A. DeForest, MBA | Founder & CEO, The DeForest Group, LLC defensesalescoach@gmail.com US: +1-678-227-4474 | EU: +48-881-943-199



Defense Sales Academy / Defense Sales Coach

- Positions Romania as a trusted hub for BTG sales, training, and sustainment
- Creates a pipeline of trained defense sales professionals supporting NATO readiness
- Builds enduring trust with U.S. buyers and NATO partners
- Demonstrates long-term industry commitment to the region

Michael A. DeForest, MBA | Founder & CEO, The DeForest Group, LLC defensesalescoach@gmail.com US: +1-678-227-4474 | EU: +48-881-943-199



Europe & NATO CONFERENCE

How the Private Sector Can Partner with Romania as a Regional Defense Hub