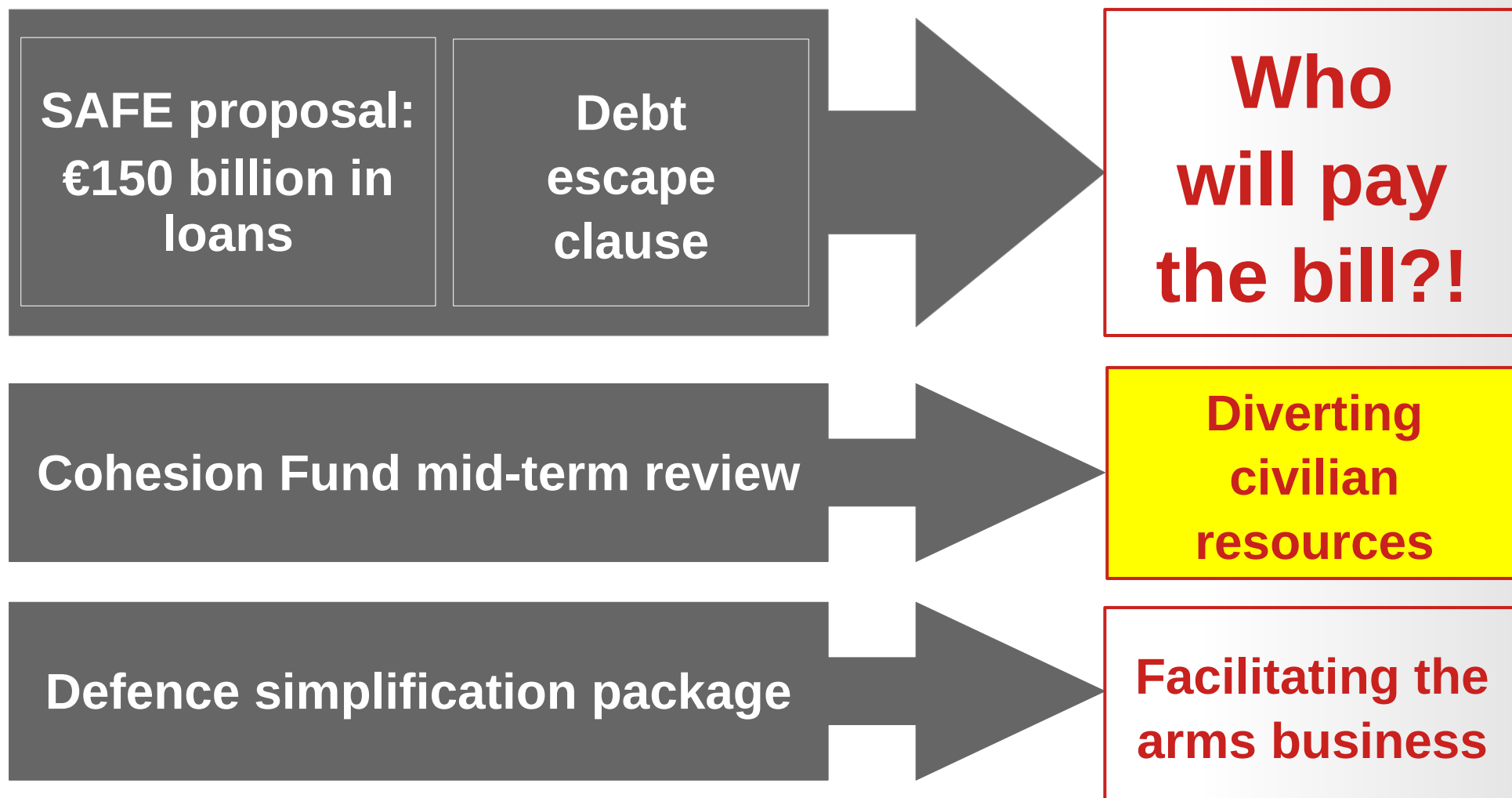


Unveiling Europe's arms industry lobbying

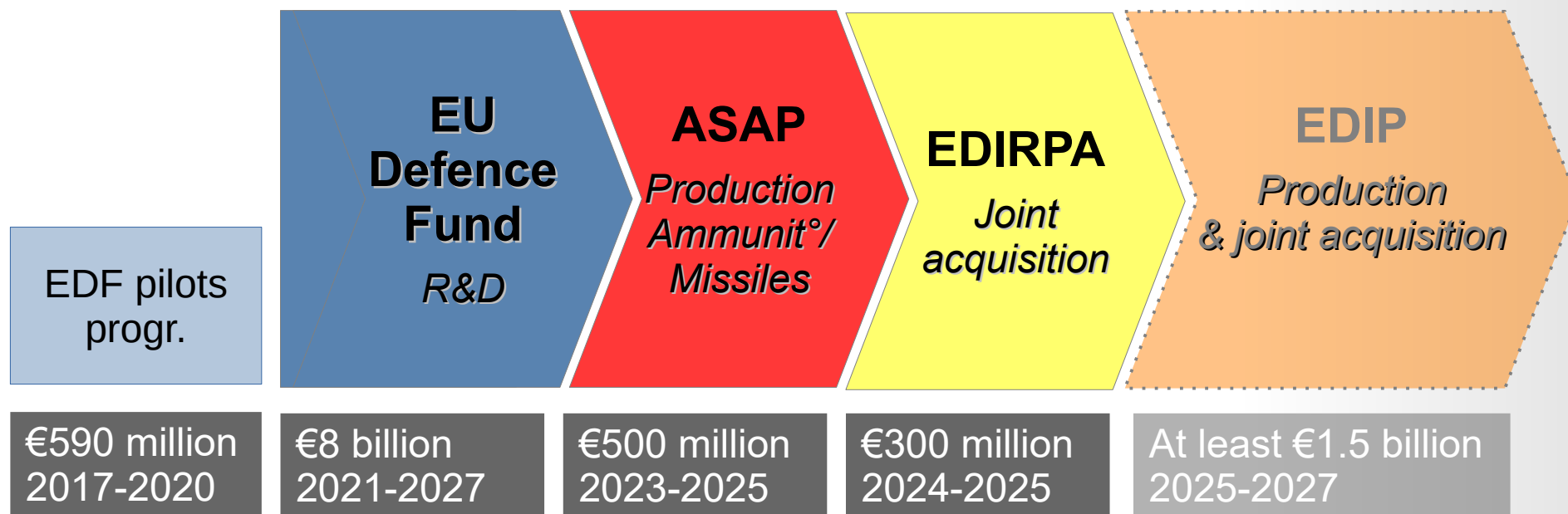
Laëtitia Sédou

Dataharvest, 23 May 2025

ReArm Europe plan & White paper for defence

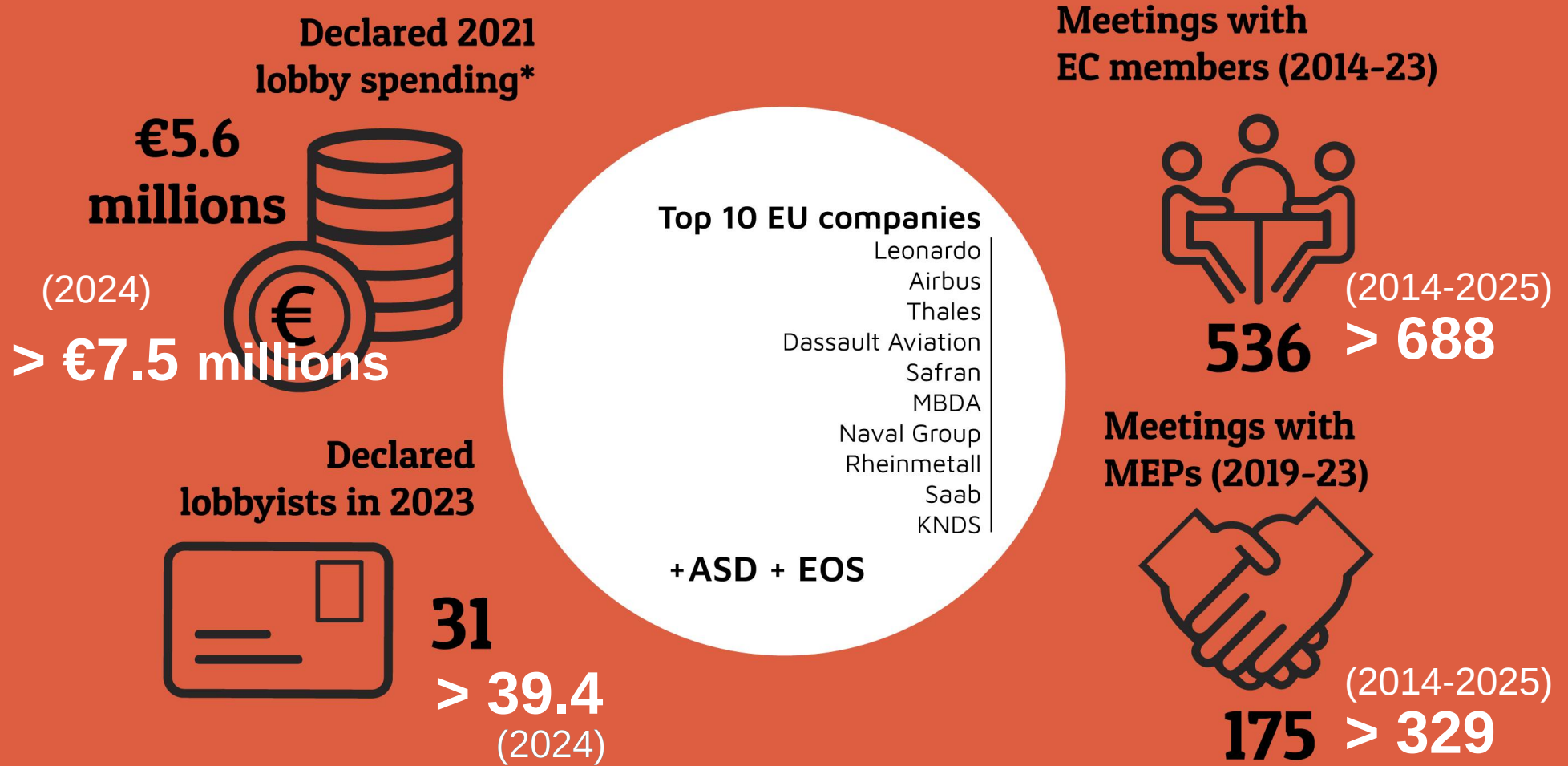


EU funding specifically for arms industry



The key players: lobbyists and policy-makers

Lobbying of top 10 EU arms companies and main associations



* Upper range

The key players: lobbyists and policy-makers

Aerospace, Security & Defence industries Association of Europe (ASD)

➤ 26 large arms and space companies:

Airbus (EU), Antonov (UA), AvioAero (IT), BAE Systems (UK), Dassault Aviation (FR), Diehl (DE), EM&E (SP), Fincantieri (IT), GKN Aerospace (UK), Hensoldt (DE), Indra (SP), KNDS (FR-DE), Kongsberg (NO), Leonardo (IT), Liebherr (DE), MBDA (EU), Naval Group (FR), Navantia (SP), Patria (FI), PGZ (PL), Rheinmetall (DE), Rolls-Royce (UK), Saab (SW), Safran (FR), Sopra Steria (FR), Thales (FR)

➤ 23 national defence and space industry associations:

AUS, BE, CZ, DK, FI, FR, DE, GR, IT, NL, NO, PO, PT, RO, SP, SW, Turkey, UK

➤ Board:

Chairman: Guillaume Faury (CEO of Airbus)

Vice-Chairman: Micael Johansson (CEO of Saab)

20 company CEOs + 10 national ass. Heads


➤ Corporate team:

Secretary-General: Jan Pie

Defence & Security Director: Burkard Schmitt

The key players: lobbyists and policy-makers

Ten largest EU arms companies – lobby expenditure and meetings with European Commission and MEPs

Company	Country	SIPRI Top 100 (2024)	Lobby expenditure (2023)	FTE (2023)	EP accredited lobbyists (2023)	Meetings Commission* (2014-25)	Meetings MEPs** (2019-25)
Airbus 	Transeuropean	12	€1.750.000 - €1.999.999	5,3	3	335	128
Leonardo 	Italy	13	€300.000 - €399.999	5,0	6	75	38
Thales 	France	16	€700.000 - €799.999	4,5	1	43	21
Rheinmetall 	Germany	26	€500.000 - €599.999	4,5	4	4	6
MBDA 	Transeuropean	30	€50.000 - €99.999	0.5	4	12	19
Naval Group 	France	32	€200.000 - €299.999	1,5	0	12	6
Safran 	France	33	€400.000 - €499.999	5,0	6	37	39
Saab 	Sweden	35	€800.000 - €899.999	4,0	0	20	12
KNDS 	Transeuropean	45	*** €200.000 - €399.999	2,5	2	7	13
Dassault Aviation 	France	46	€500.000 - €599.999	1,0	2	23	16

Lobby organisations

ASD**** 		€500.000 - €699.999	4,0	12	102	28
EOS ¹		€100.000 - €199.999	1,6	1	18	3


Sources: SIPRI Top 100 – 2024; EU Transparency Register; Transparency International: EU Integrity Watch - * 1 December 2014 – 25 April 2025; ** 1 July 2019 – 25 April 2025; *** KNDS France and KNDS Germany; **** including ASD-Eurospace

¹European Organisation for Security (<https://eos-eu.com/>), whose members include Airbus, Collins Aerospace, Hensoldt, Indra, Leonardo and Thales (<https://www.eos-eu.com/members>)

- Members of the 2016 Group of personalities
- Top 15 beneficiaries of EDF 2021 and/or precursor programmes
- Members of the EC expert group on space, defence & aeronautics

The key players: lobbyists and policy-makers

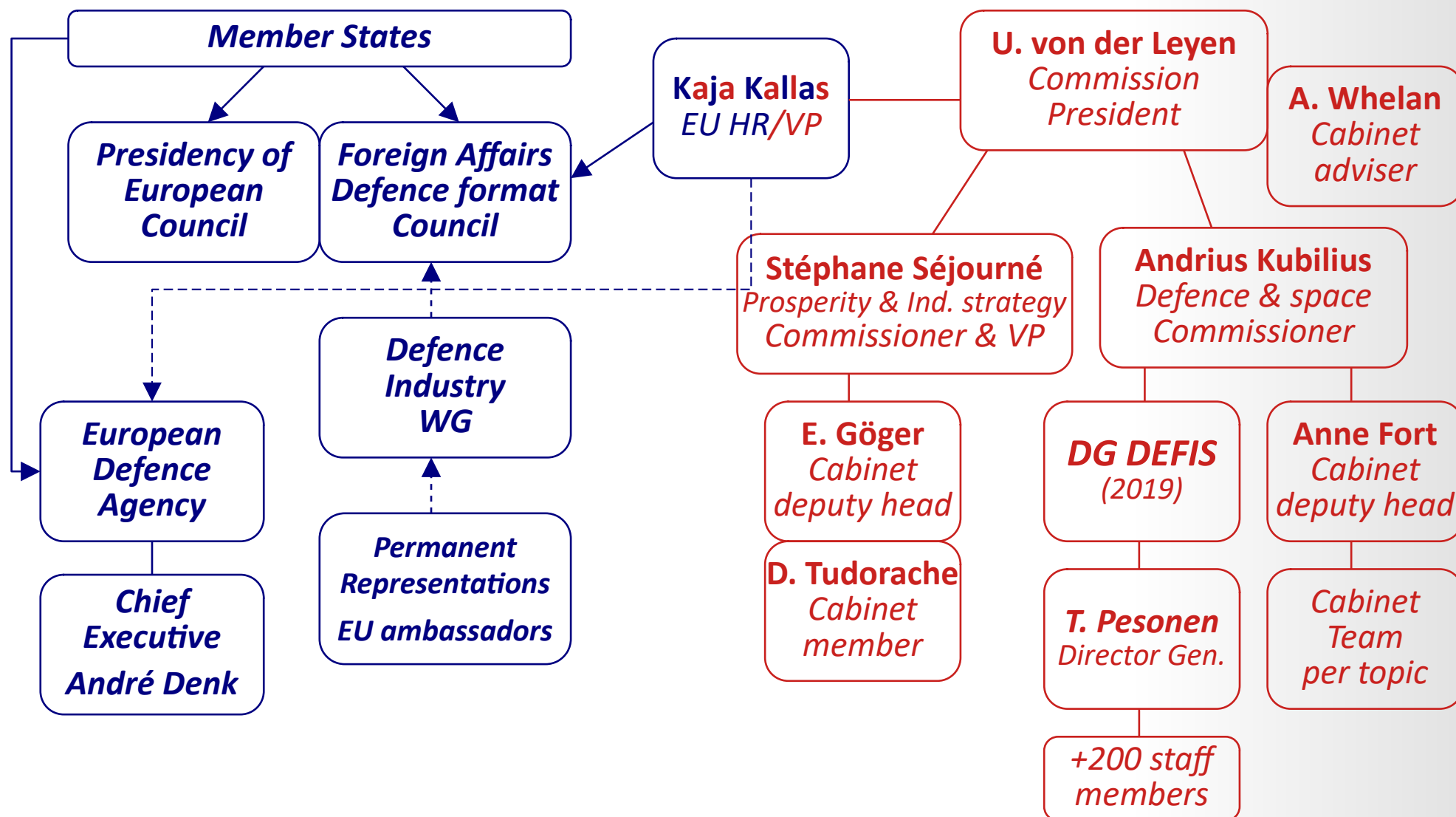
Business Bridge Europe – clients from military industry (2013-2022)*

Name	Years	Amount	Name	Years	Amount
ASD 	2013-19	€400,000 - €825,000	OHB 	2013-22	€80,000 - €250,000
Airbus 	2013-22	€555,000 - €1,225,000	Orbex	2021-22	€20,000 - €50,000
ArianeGroup 	2013-22	€155,000 - €375,000	RHEA Group	2019-22	€60,000 - €125,000
Avio 	2017-19	€30,000 - €75,000	Rolls-Royce	2015-16	€20,000 - €50,000
Fincantieri 	2021-22	€0 - €20,000	SABCA 	2018-22	€0 - €40,000
GMV 	2015-16/21-22	€20,000 - €70,000	Saft Batteries	2017-18	€20,000 - €50,000
Hisdesat 	2017-19	€0 - €30,000	Saint-Gobain	2018	€0 - €10,000
Indra 	2015-16/18-22	€40,000 - €120,000	Scysis	2018	€0 - €10,000
Inmarsat	2013-16	€30,000 - €125,000	Serco	2017-18	€0 - €20,000
Leonardo 	2013-22	€110,000 - €325,000	SES 	2013-22	€90,000 - €250,000
MBDA 	2021-22	€20,000 - €50,000	Thales 	2013-22	€100,000 - €300,000
Nexter 	2021-22	€0 - €20,000	Total		€1,750,000 - € 4,415,000

Source: EU Transparency Register; * Business Bridge Europe didn't register a file for the year 2020

- Members of the 2016 Group of personalities
- Top 15 beneficiaries of EDF 2021 and/or precursor programmes
- Members of the DSA EC expert group on space, defence & aeronautics

The key players: lobbyists and policy-makers



The key players: lobbyists and policy-makers

European Parliament

sidelined

ITRE committee

SEDE committee

Chair: B. Budka (EPP, PL)

Chair: M.A. Strack-Zimmermann (Renew, DE)

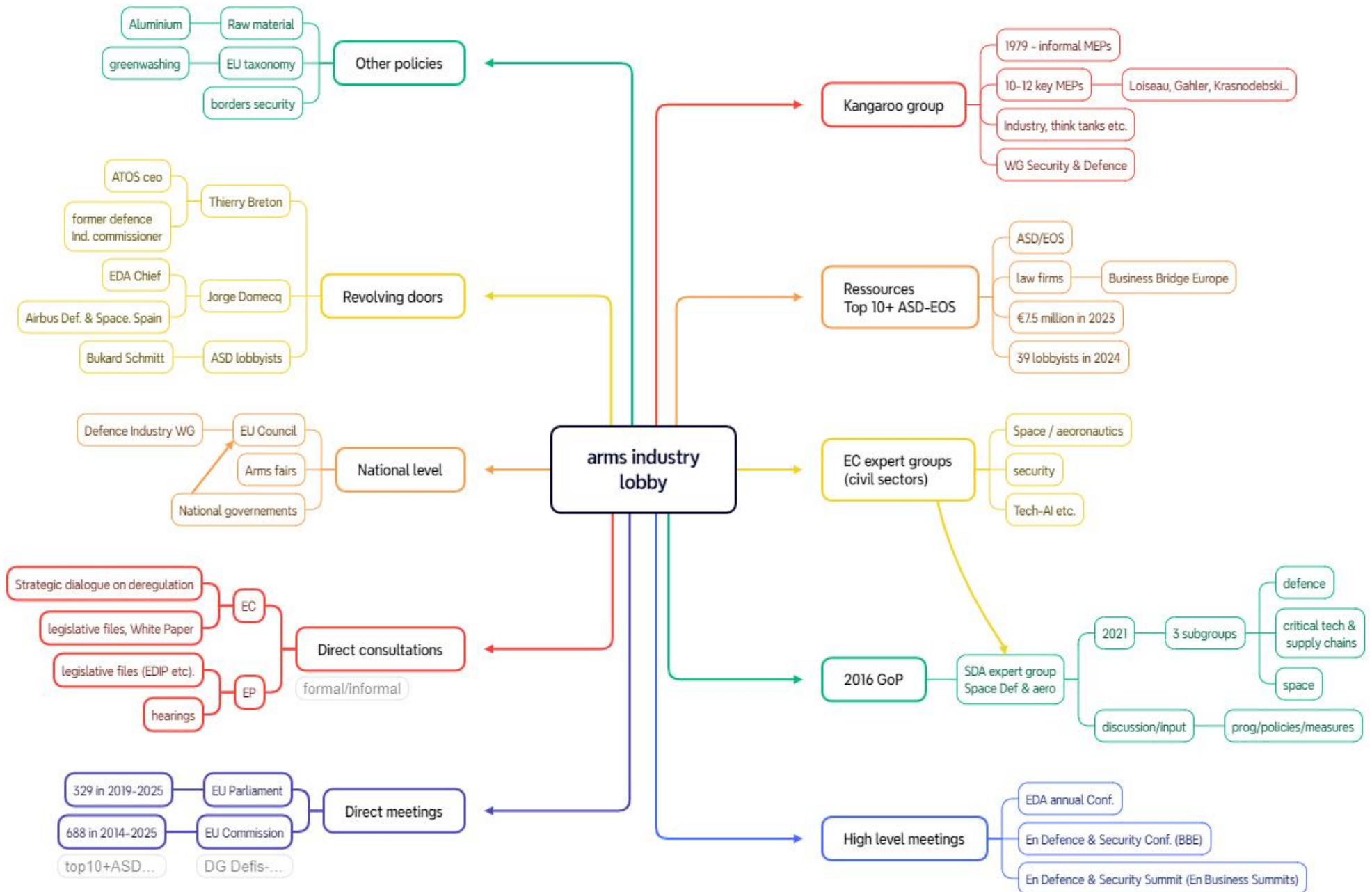
Political groups coordinators

Influential MEPs

EPP: Michael Gahler (DE), F.X. Bellamy (FR)
S&D: R. Glucksmann (FR), J. Lopez (SP)
Renew: P. Austrevicius (LT), U Paet (EST)
Greens/EFA: Hannah Neumann (DE)
The Left: O. Demirel (DE)
.....

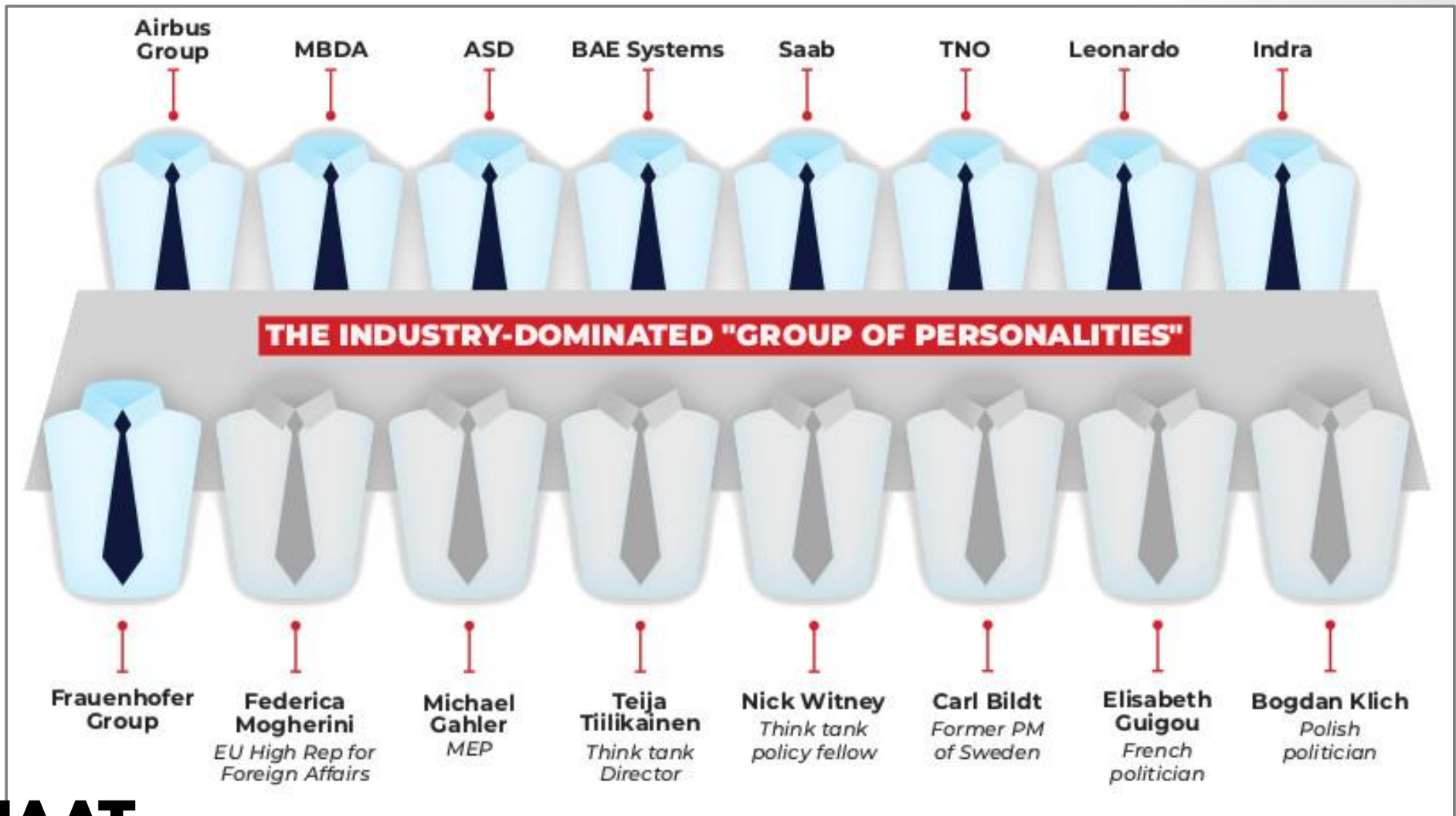
- **EPP:** N. Pascual de la Parte (SP), R. Jukneviene (LT)
C. Ehler (DE), E. Maydell (BG)
- **S&D:** N. Dan (RO), S. Mikser (EST)
- **ECR:** D. Obajek (PL), R. Poznaks (LV)
- **Renew:** C. Grudler (FR), S. Friis (DK), N. Loiseau (FR)
- **Greens/EFA:** M. Bloss (DE), V. Niinistö (FI)
- **The Left:** M. Botenga (BE)

modus operandi & strategies

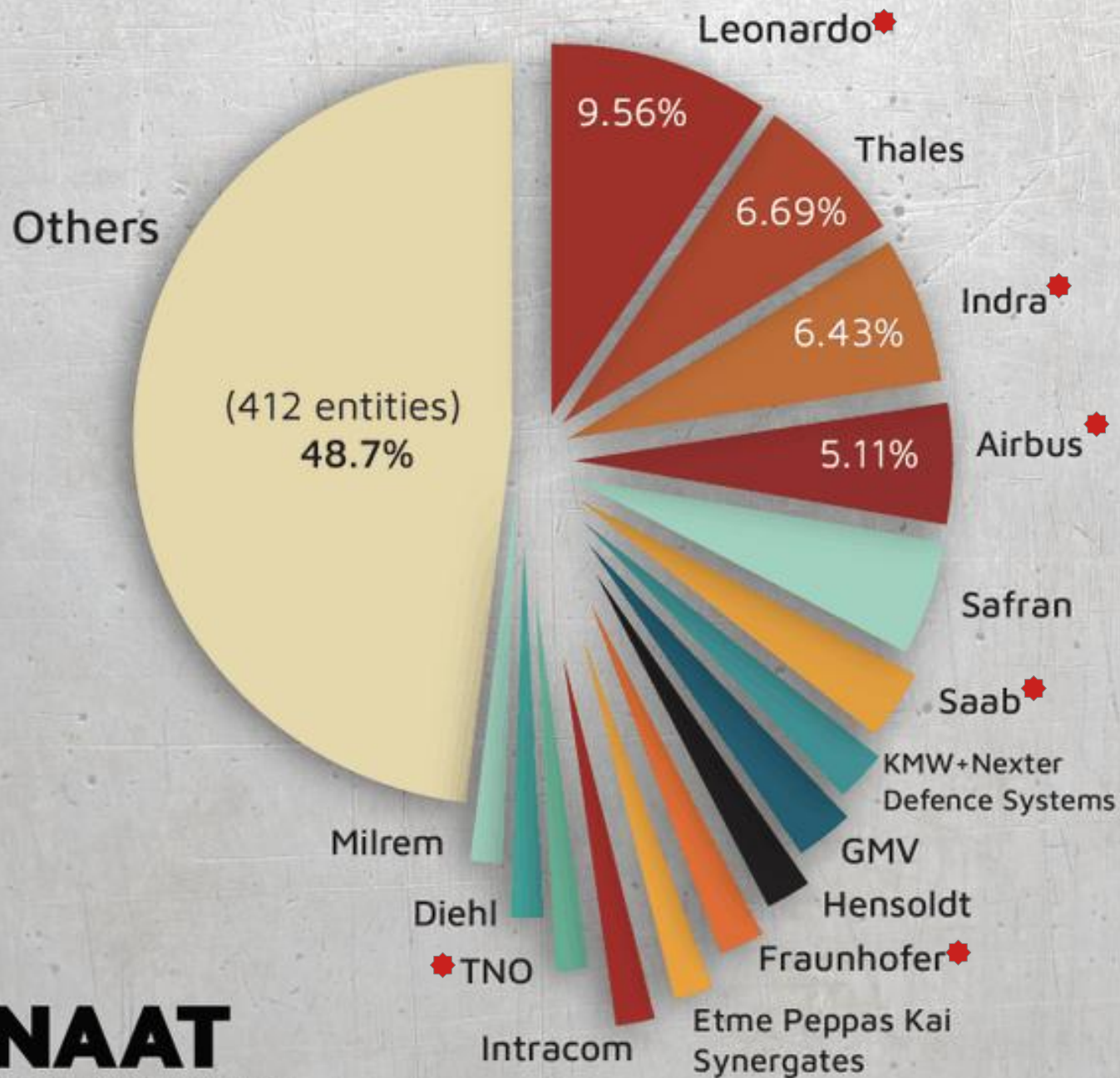


EU funding specifically for arms industry

- The EDF and precursor programmes were largely based on the advisory report of the 2016 Group of Personalities

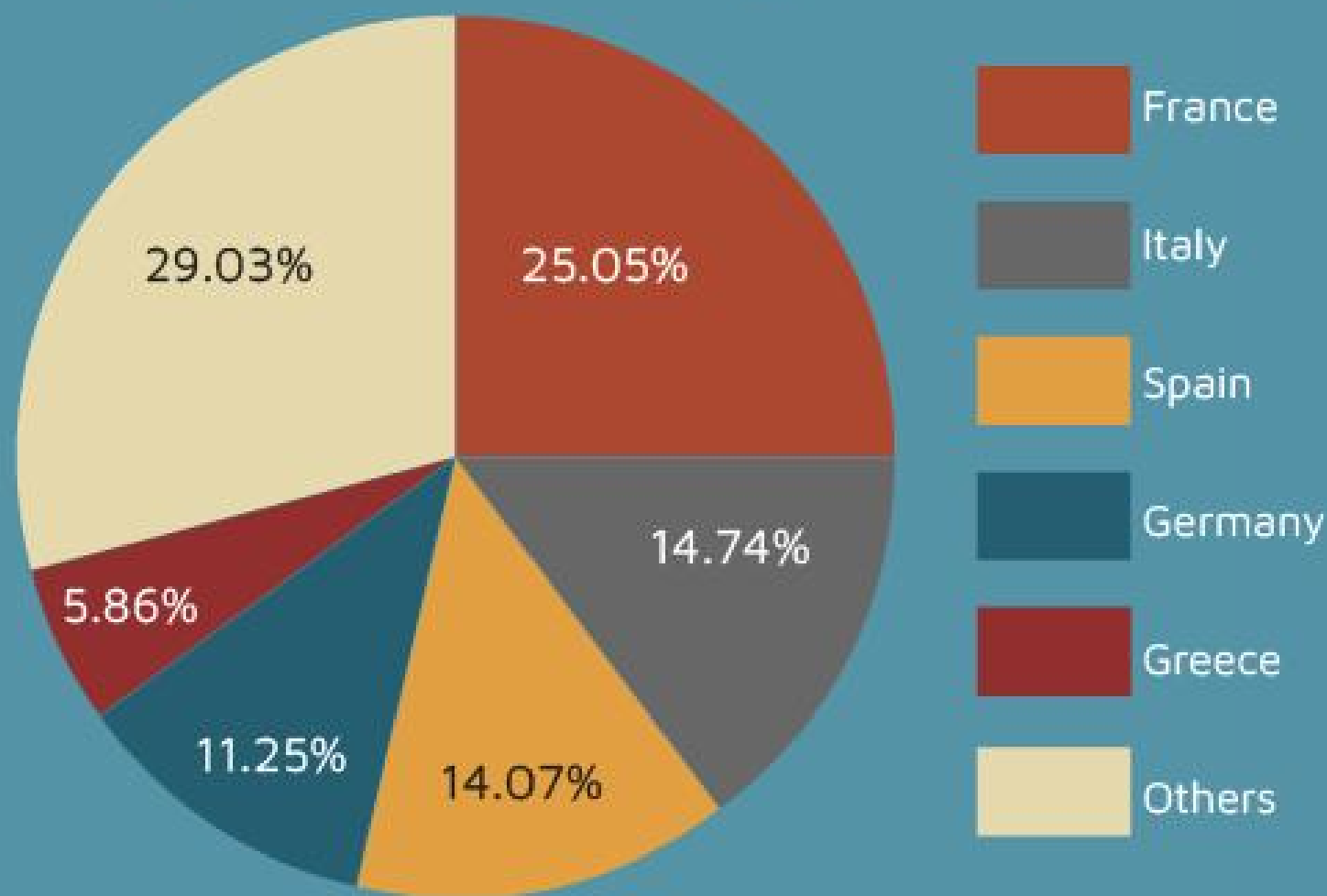


Top 15 beneficiaries PADR and EDIDP funding



**PADR &
EDIDP
funding**

Top 5 beneficiary countries:



The 'big four' (France, Italy, Spain, Germany) get together almost two-third (65.1%) of total funding

Source:
ENAAT 2022
fact-sheet

modus operandi & strategies

Two major narratives to support their influence:

- ♦ Growth & jobs, competitiveness

Arms exports > global competitiveness > technological race with US/China > European prosperity & “way of life”

- ♦ Security provider

Arms exports > affordable military equipment > security > sustainability > democracy

✓ *they no longer only want to exert influence behind closed doors, but also in public debate*

✓ *trying (and succeeding) to improve their image as:*

- ✓ *sustainable guarantor of security*

- ✓ *a friendly sports sponsor next door*

- ✓ *saviour of a faltering economy*

✓ *the arms industry is gaining more and more self-confidence. Its representatives are increasingly appearing as experts in the media*

Files to follow-up and stories

“We are “the defence industry voice” within the Commission to highlight the need of the defence industry to make sure that the CRM Act is not only about economic and green considerations, although they are very very important but that we must also take into account the security dimension.”

Christina Wilen, DG DEFIS, European Commission, September 2023

Proposing aluminium as a strategic raw material raises questions. It doesn't align with the Commission's methodology, suggesting industry influence.

Friends of the Earth, February 2023



*2023, Observatoire des Multinationales
& Corporate Europe Observatory*

Files to follow-up and stories

- ◆ **Lack of accountability and transparency while preparing the wars of the future:**
 - x exemption clause & implementing acts side-lining the EP
 - x poor ethical checks & undisclosed list of experts
 - x limited available information on technologies being developed (AI, unmanned & autonomous weapons, laser tech, hypersonic weapons...)
- ◆ **Arms exports & the global arms race:**
 - x Facilitating exports of jointly produced / acquired weaponry
 - x Western components in Russian weaponry... The French case, others?
 - x Ukraine, the new arsenal for Europe... and beyond?
- ◆ **Rearmament and the climate emergency:**
 - x The military carbon footprint & the risks of framing climate change as a security threat
 - x Is there such a thing as green weapons?
 - x Diverting sustainable finance (EIB & co), skills & raw material

Files to follow-up and stories

◆ Challenging the narratives:

- x Is the armament sector so crucial for growth & jobs?
- x Are money and armament the key problem of European defence?
- x Can the EU be both a soft power and a hard power?

◆ Who really are the beneficiaries?

- x corruption in the armament sector (Corruption Tracker: <https://corruption-tracker.org/>)
- x Joint-ventures and relocations
- x Duplication of projects : the HYDEF case
- x (future) partnerships with non-EU/European countries

◆ Where is the Eurodrone?

- x after a decade &
- x a 100 million direct grant

◆ Who are the war profiteers?

- x Profits and revenues of arms companies since the Russian invasion of Ukraine

War profiteers

European arms company revenue and profits 2022

■ Change in operational profits 2021-2022 ■ Change in share price over 2022 ■ Change in arms sales 2021-2022

Airbus



KNDS (Nexter+KMW)



BAE Systems



Rheinmetall



Thales



Fincantieri



Rolls-Royce



Leonardo



Saab



Naval Group



Babcock International



MBDA



Safran



Dassault Aviation



TKMS



Researching & tracking arms industry lobby

◆ Tracking lobby expenditures and meetings:

Tracking per company:

EU Transparency register: https://transparency-register.europa.eu/index_en

LobbyFacts database: <https://www.lobbyfacts.eu/>

Integrity Watch EU: <https://www.integritywatch.eu/>

Tracking per decision-maker:

EC commissioner page, MEP personal page or EP procedure file (ex/ EDIP):
[https://oeil.secure.europarl.europa.eu/oeil/en/procedure-file?reference=2024/0061\(COD\)](https://oeil.secure.europarl.europa.eu/oeil/en/procedure-file?reference=2024/0061(COD))

> FOIs to know content of meetings with EC

High level meetings:

European Defence & Security Summit (European Business Summits, June):
<https://ebsummits.eu/our-summits/european-defence-security/>

European Defence and Security Conference (Business Bridge Europe, October)
<https://defencesecurityconference.eu/>

EDA Annual conference (Winter): <https://annualconference.eda.europa.eu/>

Researching & tracking arms industry lobby

◆ EC expert group on Policies & Programmes relevant to EU Space, Defence and Aeronautics Industry (SDA)

<https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?lang=en&groupID=3775>

> Subgroup on defence

> list of members, agendas and minutes of meetings

◆ Research beneficiaries and projects:

Financial Transparency system:

<https://ec.europa.eu/budget/financial-transparency-system/analysis.html>

Open Security Data Europe: <https://opensecuritydata.eu/>

> Press releases from the beneficiaries, specialised press

> MEPs written questions:

<https://www.europarl.europa.eu/plenary/en/parliamentary-questions.html#sidesForm>

> Introduce FOIs: <https://www.asktheeu.org/>

> Complaints to the European Ombudsman: <https://www.ombudsman.europa.eu/en/home>
<https://www.ombudsman.europa.eu/en/home>

Researching & tracking arms industry lobby

◆ Tracking arms exports:

EU official database:

<https://webgate.ec.europa.eu/eeasqap/sense/app/75fd8e6e-68ac-42dd-a078-f616633118bb/overview>

ENAAT/CAAT-UK browser: <https://enaat.org/eu-export-browser/>

ExitArms (Facing Finance): <https://exitarms.org/>

◆ Useful sources/databases:

SIPRI databases (global): military expenditure, top 100 arms industry, arms transfers

<https://www.sipri.org/databases>

ENAAT newsletters: <https://enaat.org/newsletter/>

specialised press:

> DefenseNews (Europe Brief): <https://www.defensenews.com/>

> Janes: <https://www.janes.com/osint-insights/defence-news>

> Defence Industry Europe: <https://defence-industry.eu/>

> Bruxelles2pro (FR): <https://club.bruxelles2.eu/>

DG DEFIS: https://defence-industry-space.ec.europa.eu/index_en

EDA: <https://eda.europa.eu/>



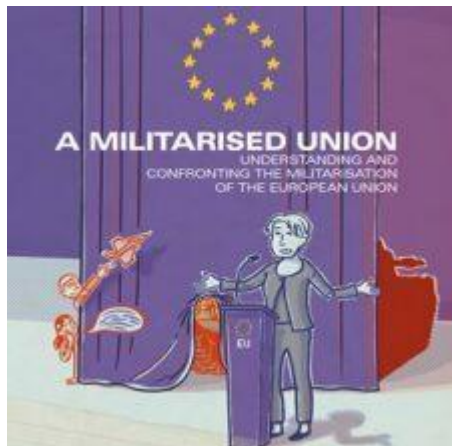
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attention!**

www.enaat.org

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laetitia@enaat.org - +32.496.15.83.91

Further reading



www.enaat.org



- *Financing Border Wars* (www.tni.org) & other related publications
- *Indefensible, seven myths that sustain the global arms race*, Paul Holden et AL.
- *Climate collateral, how military spending accelerates climate breakdown*, Transnational Institute (www.tni.org) & other related publications with SGR (<https://www.sgr.org.uk>)
- *Security policies for peace, Another security is possible and necessary*, Centre Delas, Jordi Calvo (coord.)
- *Arms trade, conflicts and human rights, Analysis of European arms exports to countries in armed conflict and human rights violations*, Centre Delas (www.centredelas.org)