

The European Defence Industry Report



Foreword

The world has become a more dangerous place since 2016. Instability on the borders of Europe, difficult political calculations both at home and across the Atlantic, and finally the full-scale Russian invasion of Ukraine have all prompted Europe to 'wake up' to the difficult situation we face in the context of security and defence.

Industry has looked to respond to these developments with rapid technological development and production, however, significant barriers remain at the political and policymaking levels to defence industrial co-operation. Most crucially, the lack of formal co-operation between the EU and UK is currently dividing one of Europe's largest defence powers and the continent, where geography as well as policy matters.

The British Chamber of Commerce EU & Belgium is proud to present this European Defence Industry report which highlights the need to urgently facilitate untethered European industrial co-operation in order to maximise European security perspectives.

This report is the culmination of extensive research, consultations, and contributions from industry across Europe, from SMEs to Prime contractors, trade associations to policymakers. Uniquely, this initiative provides a consolidated account of the series of challenges and barriers that industry cross-border are finding. It demonstrates that similar issues pervade across Europe building on the wealth of anecdotal evidence that already exists within the industry, government and institutions.

Importantly, the report offers actionable recommendations for stakeholders to deploy in order to strengthen co-operation, and we will be working with Governments both current and new to encourage the implementation of these recommendations in the most effective way possible.

We extend our gratitude to all those who contributed to the report and hope that this serves as a valuable resource for policymakers, industry leaders, and all stakeholders committed to advancing European security and defence co-operation.

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Executive Summary

This report culminates with recommendations to maximise the opportunities for enhanced EU-UK defence industry co-operation. Factors driving the recommendations are covered in part or in detail within this document and include the following considerations:

- The full-scale Russian invasion of Ukraine and possibility of further escalation has ignited European defence and defence industrial issues across the continent, coupled with additional geopolitical developments and security concerns, such as in the Indo-Pacific.
- From the EU's perspective, uncertainties regarding US commitment to European defence, war and increased instability in the near neighbourhood has catalysed the European Commission's efforts to strengthen the EU's defence industrial base in the pursuit of greater EU strategic autonomy. The introduction of EU-specific defence industrial instruments and initiatives has been fundamental in this context.
- To secure Europe more effectively, EU Institutions, UK Government, and European Allies should, as a starting point, establish a formal EU-UK Defence Dialogue. This is critical in order to improve access to defence markets and programmes, address barriers to growth and co-operation of the defence sector in Europe and to explore the opportunities for a more formal defence industrial co-operation framework. As such, instead of pursuing a limited, EU strategic autonomy, we propose the pursuit of a geographic European strategic autonomy, which includes the UK, in line with recent comments made by President Macron of France.
- Ukraine's victory against Russian aggression, the building of European sovereign defence capabilities, and stronger industrial relations with global partners, are highly dependent on overcoming recalcitrant relationships with Europe's largest defence actors
- Success for the defence of all of Europe depends on collaboration between the UK and EU, starting with a recognition of the interconnected nature of the defence industry landscape, and the importance of collective security.



Context

For many years, while European collaboration was being strengthened across several different areas, including trade, competition, internal market policies, immigration and more, defence cooperation failed to follow the same trend. This is important owing to the vital role that the defence sector plays in both the EU and UK economies.

In Europe, the defence sector employed over 500,000 people, with turnover of over €135bn (£115bn) and exports of €52.4bn (£45bn) according to ASD data in 2022. In the UK alone, there are over 147,000 directly employed in the defence sector, with turnover of £23bn (€27bn) and exports totalling £7.5bn (€ 8.78bn) on a three-year average according to ADS data in 2022.

Though the EU's Common Foreign and Security Policy (CFSP) had been formally announced in the 1993 Treaty of Maastricht and strengthened in treaties that followed, collaboration between states in the area of defence remained nonetheless limited for decades. Indeed, defence was viewed by European governments, analysts and scholars as the last bastion of the traditional conception of national sovereignty – as such the involvement of the EU in this area was relatively minor.

However, three key, interrelated developments since 2016 have changed or are changing the course of defence collaboration in Europe:

1. The first was a proliferation of perception amongst Europeans that its traditional defence and security partner, the US, had become increasingly less invested in European security.
2. The second was the 2016 EU Global Strategy, which explicitly referred to the concept of 'strategic autonomy' for the first time in an EU document. Strategic autonomy for the EU refers to it being able to act in its neighbourhood and on the global stage, especially militarily, without relying on the United States.
3. The third is the ongoing full scale Russian invasion of Ukraine since 2022, which has demonstrated flaws not only in the collective (or lack thereof) approach of the EU towards Russia but has also necessitated a reinterpretation of defence industrial preparedness and collaboration within the bloc.

These three elements have spurred on a surge of new developments in the area of EU defence which just a few years prior would have been deemed unimaginable by scholars, analysts and government representatives alike.

This includes the development of a new Directorate General in the European Commission for Defence Industry and Space (DG DEFIS); the creation of a European Defence Fund (EDF); the development of a European Defence Industrial Strategy (EDIS) and a nascent European Defence Industry Programme (EDIP) that has followed the more short-term, Ukraine-focused European Defence Industry through Common Procurement Act (EDIRPA) and the Act in support of ammunition production (ASAP); the formation of a European Peace Facility (EPF); the unlocking of Permanent Structured Cooperation (PESCO) that had been available since the 2009 Lisbon Treaty; and a Coordinated Annual Review on Defence (CARD) that feeds into the European Defence Agency's (EDA) Capability Development Priorities (CDP).

It is also important to note that some of these instruments (EDF, EDIRPA, and ASAP) are not about generating defence capabilities in their own right, but are more focused on EU industrial policy and the competitiveness of EU industry, as defined in their legal basis.

EDIS offers the opportunity for a new type of conversation, in relation to the strategic context of EU-UK defence industries. As a consequence of this, the EU has entered into an arena of becoming a real defence industrial player, which the UK must recognise. Equally, the EU must recognise the balance of decisions it must now take between its defence and economic interests, where previously it may have only focused on the latter.

Industrial competitiveness vs defence

It is our belief, informed by the European defence industry, that the pursuit of an EU-focused strategic autonomy ultimately does not deliver truly European defence industrial collaboration due to the effective exclusion of the UK, one of Europe's most significant defence and security powers.

Indeed, when the UK left the EU on the 1st of January 2021, insofar as defence is concerned, it left on no-deal terms. This has created several challenges for European defence industrial co-operation, which are detailed below.

Strengthening the EU and UK relationship is fundamental to European security. To maximise these efforts, the effective functioning of a truly European defence industrial base is essential. Many actors within the EU and UK industrial bases operate valued subsidiaries and joint ventures in each other's markets, as well as multinational collaborative programmes, and their subsequent contributions to NATO underpin the defence and security of the Alliance and its partners. Indeed, since 2022, the EU and UK have collectively made a total contribution to Ukraine (financial, humanitarian and military) of just under €116 bn (£100 bn).

Similarly, without effective European defence industrial co-operation (including the UK) it is difficult to achieve sizeable economies of scale, missing out on the benefits of co-creation, shared volume, extended production runs and joint through-life sustainment. The EU and UK are inextricably linked within the European defence industrial base and should not be viewed as separate ecosystems by either party. In this light, the British Chamber of Commerce | EU & Belgium welcomes references to geographic Europe in President of France, Emmanuel Macron's recent Sorbonne speech and would like to see such statements replicated throughout the EU.

The 2019 Joint Political Declaration, which set out a non-legally binding framework for the future relationship between the UK and the EU, established the principles of what a future defence and security relationship could entail, including the ambition for broad, deep and flexible defence partnerships such as UK involvement in EU programmes. Nevertheless, this did not form part of the subsequent negotiations that led to the 2020 EU-UK Trade and Cooperation Agreement (TCA) or the 2023 Windsor Framework. Nor did it lead to any parallel discussions with the same intent.

Given Russia's full-scale illegal invasion of Ukraine in 2022 and growing security challenges in Europe and beyond, the EU and UK must work to break down the political obstacles and regulatory mechanisms which are currently causing industrial fragmentation, duplication of effort, reduced economies of scale, and ultimately undermining our collective security as well as the security of our wider Allies.

We hope that this report, informed by evidence provided anonymously by the European defence industry, large and small players alike, will support the EU Commission, its Member State nations and UK representatives in the near future, building on the successes of the Windsor Framework and the UK's participation in Horizon and Copernicus, to strengthen European defence industrial co-operation and collaboration.





Impacts on European industry – The State of Play since Brexit

A lack of co-operation between the UK and the EU since the UK left the European Union has had a number of implications for the European defence industry, similar to problems experienced in many other sectors. Barriers have been created, with clear potential for further barriers to develop, which limit collaboration. This report highlights a number of themes which industry regards as barriers to European Defence collaboration: the UK's lack of participation in EU defence initiatives, employment and skills, trade, supply chains and regulatory divergence.

UK participation in EU defence initiatives and broader strategic issues

At present, UK participation in EU defence initiatives such as EDF, PESCO, EDIRPA and ASAP is either extremely limited or virtually non-existent. Meanwhile, the United States participates in PESCO projects, has an Administrative Arrangement with the European Defence Agency and a structured Defence Dialogue with the EU. It is almost inconceivable that the UK, a key European ally, collaborates less with the EU than the US, which the EU Commission has made explicit its desire to become less reliant upon.

For the UK, the risks of continued non-involvement are clear, long-term, the UK's freedom of choice will be constrained as potential partners within the EU co-operate on defence industrial programmes and other defence initiatives under EU instruments, all of which currently contain third country terms which effectively prevent any meaningful UK involvement. Indeed, there are already some instances where UK companies are not involved in research & development (R&D) and advanced capability projects, such as in hypersonics, in which under normal circumstances they would probably have a leading role. This risk grows each time the EU expands its defence initiatives, threatening the long-term competitiveness of the UK defence industry and compromising European collective security under NATO.

For the EU, there are also risks. For instance, companies with significant presence and even headquarters in the EU cannot include or share information with their UK operations on certain EU initiatives, such as EDF projects. As such, their involvement in these EU projects is, at best, minimal. The EU is therefore missing out on world-class technologies and capabilities in UK industry including within their own companies which can contribute to the success of EU initiatives. When looking at other initiatives, the EU similarly misses out on the ability to market PESCO and EDF products in an equally large market inside the UK, with close links and potential for follow-on exports to the Middle East and Indo-Pacific.

Moreover, it is important to recognise that the UK defence market is currently well-known for being one of the most open, with the Ministry of Defence's top suppliers including firms with EU headquarters such as Thales, Leonardo, and Airbus. Current supply chains are integrated within the EU to great volumes, from engines to sensors to mission systems. Disrupting this mutually beneficial ecosystem by increasing protectionism in the single market risks severing both defence industries from what is already not a level playing field.

Current third country participation terms and conditions in EU defence initiatives, such as the EDF, EDIRPA, ASAP, and EDIP are ambiguous and/or make UK participation impossible given the concessions required in areas such as export controls and IP rights. Several EDF programmes have already in effect promulgated UK exclusion, including in ammunition and weapons, hypersonics,

electronic warfare, autonomy, sensing, interoperability standards, disruptive technologies and radar systems. EDIRPA and ASAP were only open to economic operations based in the EU or associated third countries so there was no avenue for cooperation with the UK.

Of particular concern for European industry is the EU Commission's proposed targets within EDIS for EU Member States to reduce their reliance on 'non-EU' defence solutions i.e. the UK – though EDIS and EDIP are at a nascent stage. Significant time has been spent rehearsing the technical details of third nation terms versus the need for EU taxpayer money to be used only for EU firms. Instead, a conversation about the strategic direction of truly European defence solutions might be more effective, targeting specific initiatives to reduce fragmentation, increase resilience, production, and identifying the best methods to get there.

It must be recognised that in the current circumstances, Europe, as a whole, suffers.

Finally, effective European industrial co-operation must endure no duplication. In this context, the proper articulation of EU and NATO initiatives that are complementary rather than mutually disruptive, to multinational industrial co-operation must be encouraged, as per several EU-NATO agreements including the Joint Declaration. Burden sharing, including at industrial level, is vital for the future of allied cooperation and NATO, particularly as European capabilities have consistently delivered and will continue to bring new solutions to counter emerging threats and global security challenges.

It is imperative that NATO-EU co-operation move beyond dialogue, fully embracing the co-operative principles sought in the EU-NATO Joint Declaration. This means working towards an environment that facilitates transatlantic industrial co-operation with terms and conditions that enable collaborative projects that simultaneously protect the European defence industry as a whole; such as in innovation, information exchange on capability and procurement planning and utilisation of OCCAR and NSPA.

Recommendations:

- **A regular and formalised EU-UK Defence Dialogue to discuss ways to practically strengthen European co-operation with the involvement of the European defence industry. This would hold at its core the desire to seek a more structured and comprehensive UK-EU defence industrial cooperation framework;**
- **A UK Administrative Agreement with the European Defence Agency (EDA); Providing an additional forum of exchange and dialogue and growing activities of co-operation to regulation and supply chain projects lead by the EDA;**
- **A special EU-UK relationship on Permanent Structured Cooperation (PESCO) and the European Defence Fund (EDF), unlocking avenues for closer alignment on joint Research and Development (R&D) and procurement – on a case by case basis - to the benefit of European defence industrial co-operation – this may also look to include UK financial compensation or clawback mechanisms in these programmes and projects, similar to the Horizon Europe agreement;**
- **Seamless, reciprocal access to the EU and UK defence markets and programmes, including potential EDIP projects such as the Structure for European Armament Programme (SEAP);**

Employment and skills

A major frustration (and cost) as reported by industry has been the need to organise and acquire visas for employees to travel to, and work in the EU and UK respectively. This includes short-term company transfers and longer-term movement of people for learning and development.

This is a hugely significant issue, given many companies that operate across Europe make and fit different elements of capabilities in different European countries before assembling them elsewhere in Europe. As such, Industry is reliant on the mobility of its employees. However, a number of companies report that the costs of having to transfer expert employees (including third party support and application fees) can go into the thousands of EUR/GBP just for one employee.

When adding new extended visa timeframes which can take up to six months, the costs are even more substantial. Overall, depending on the size of the company, such costs can go into the millions of EUR/GBP per annum, notwithstanding the potential loss of business opportunities as customers (governments) may decide they do not wish to wait and pursue alternative capabilities.

Moreover, the significantly increased administrative burdens take up substantial time, a business cost in itself. Companies seeking to transfer UK employees to EU countries, for instance, can be required to provide respective authorities with the following: the employees passport, job description, their employment contract, a CV, their academic qualifications, an assignment letter and a healthcare insurance certificate, among numerous other documentation just to be able to demonstrate comparable salary information of respective pay scales.

Furthermore, depending on the working permit, proof of a landlord agreement may also be needed. In addition, a company may also need to supply a Power of Attorney letter as well as other corporate documentation. This process can take up to 11-13 weeks in some cases to complete. It is also important to consider that the UK and each EU country have their own processes for obtaining a work permit and that, in addition to the above, companies must also include translations and notarisation of documentation.

Clearly, and particularly in cases where a capability modification or repair is required and mobility of employees is urgent, the current lengthy process should be viewed not only as a business risk but also a risk to European security.

From 4 April 2024, the UK has raised the minimum salary requirement for a Skilled Worker Visa with an almost 50% increase to the current minimum salary threshold - from £26,200 (€30,493) per year to £38,700 (€45,000) per year. The current salary threshold has already affected Industry's ability to move junior staff for developmental purposes. The increase in the minimum salary threshold will further restrict the available 'selection pool' (and therefore opportunity) for EU colleagues to gain experience within the UK business of the same company. As such, these policies also negatively impact on pan-European skills development.

Another point worth noting is that business travel into Schengen Zone countries is restricted to 90 days in a 180-day period. This adds further complexity to business travel as personal travel within these countries is taken into account when determining if presence for a business trip is feasible.

Industry, particularly from the UK, has also reported diminished access to contingent labour overall from the EU which is a significant challenge, as where there are shortages or short-term peaks in demand for particular trades (welding, pipefitting, electricians), they can no longer easily be sourced from the EU.

This is also inherently inflationary. From the EU perspective, employees also lose out on potential economic opportunities in the UK as a result. From a national perspective, this is a particular problem for European countries who may face short-term, acute unemployment issues which can be alleviated by short-term worker transfers to, in this instance, the UK.

Recommendation:

- **A streamlined approach to enabling the transfer of people and skills to and from the EU and UK to increase the viability of European defence collaboration, and recognising the significant benefits to be achieved for European security perspectives.**

Trade, supply chains, and wider regulatory issues

Many companies referred to a wide range of trade, export and customs-related issues since the creation of a customs border between the EU and UK (excluding Northern Ireland), which have contributed to significant business costs. These have largely been priced in by bigger companies but they remain barriers for SMEs, which are the backbone of Europe's defence industry.

However, there are clearly a number of wider export-related issues that European industry has reported that are not related to the EU-UK relationship but significantly and detrimentally impact European defence industrial co-operation.

EU-UK frictions include customs and shipping processes between the EU and UK which, prior to Brexit, took three to four days but now take nine to ten days, with companies now needing to fill in customs declarations and T1 documents for the purpose of customs clearance.

Customs clearance is a necessary procedure before goods can be imported or exported internationally. For many EU and UK companies exporting to one another, especially SMEs, this is a new process which has, and is, taking Industry time to adapt to and requires Industry to buffer with inventory. The new customs and regulatory borders have undoubtedly impacted Industry as it has become more difficult and more expensive to trade with the EU and UK respectively.

Suppliers are now finding it difficult to maintain long-standing relationships with EU businesses and even more difficult to forge new relationships because of these new rules. Some UK suppliers have stopped trading with the EU altogether, whilst others continue to struggle with the effects of the logistics issues and overall bureaucracy. Just like in the case of labour, every country has its own specific rules contributing to further complications.

In some instances, an EU-based supplier has prioritised an EU customer over extant obligations in a UK contract. There is a general sense that for some components for the EU market, the UK supply-chain is now therefore only considered after EU sources have been exhausted. This is likely to be due to the highly complex manufacturing supply-chain for some components. Overall, this creates further disentanglement between the EU and UK defence market, limiting co-operation and collaboration.

One company in the EU, an SME, referred to customs and temporary import or exports of goods between the EU and the UK as a "nightmare", with even demonstration goods stuck in respective EU and UK customs and with companies receiving customs invoices even though the goods have only been temporarily imported. Moreover, Industry as a whole reports that customs issues are making delivery lead times longer and raising prices, contributing to a loss of competitive edge.

One multinational company operating across Europe raised a significant concern with respect to road, air and sea transportation in terms of the additional red tape when transporting defence materials from the EU to UK, or vice versa. This has included the need to closely monitor and keep up to date with new regulations to ensure all of the business operations and documentation are in compliance and do not cause delays to shipments, for example, with individual or global transit licenses.

However, as this company, like many others in the sector, is at times unable to forecast the year ahead, it can be difficult to obtain such licences. This presents a two-fold problem in that companies not only have to navigate routings for licensing purposes but also obtain licenses from countries at short notice (or in time for required delivery dates) to avoid delays. Companies in the EU also reported similar frustrations.



For companies operating in Northern Ireland (NI) but with sites in the EU and UK, the customs and regulatory process is even more complex. While their operations in NI have no requirement to make formal customs declarations for military/dual use products if exporting to the EU, sites in the rest of the UK would be required to do so. Meanwhile, materials and goods sourced or imported into NI from Great Britain which undergo processing in these companies' sites are classed as being 'at risk' of moving into the EU under the terms of the Windsor Framework. These materials and goods are then technically subject to tariffs.

One company operating in the EU and specialising in drone technology, set out the wider regulatory impacts in this crucial technology and capability area affecting the entire European drone industry. For instance, within the EU, drone operations are conducted seamlessly in accordance with light user certificates. However, in the UK, a slightly modified process is now necessary to operate drones in UK airspace – this is crucial for testing of capabilities. This variance incurs additional expenses for Industry, introduces unnecessary barriers to market entry and diminishes competition among both EU and UK companies.

Moreover, European companies' supply chains are also exposed to risks from divergence between the EU and UK's respective registration, evaluation, authorisation and restriction of chemicals (REACH) frameworks. The EU's REACH is updated every six months, whereas the UK's regime has not changed at all since the UK's departure from the EU. This could cause disruption within the supply chain due to a misunderstanding of this reality, specifically when moving goods between the EU, UK and Northern Ireland, the latter of which operates both the EU and UK regimes.

Regulatory divergence between the EU and UK is therefore creating additional barriers to maximising European defence industrial co-operation and collaboration.

Another example is the respective EU and UK Emissions Trading Schemes (ETS). Despite the core ETS scheme designs being similar, changes to the UK scheme have led to a notable discrepancy in ETS permit prices. In 2023, UK permits were trading at around £40 per tonne, and EU permits at around €87 per tonne.

Ultimately, this makes linking the two schemes difficult if prices remain some way apart for an extended period, especially on the UK side, where linkage would likely drive up the cost of credits. Similarly, on Environmental, Social and Governance (ESG) issues, we see little evidence of alignment between the EU and the UK, which Industry has raised as a fundamental issue affecting their financing, banking and capitalisation.

Recommendations:

- **A joint comprehensive review of customs, exports, and regulatory barriers that limit defence industrial collaboration within the wider economic relationship;**
- **Cooperation with European financial institutions and investment funds on supporting banking, finance and capitalisation for the defence sector, including enhanced dialogue on ESG regulations.**



Conclusion and Summary of Recommendations:

Accelerating European defence industrial co-operation through the EU-UK relationship

The success of the negotiations leading up to and culminating in the 2023 Windsor Framework and UK's reassociation to Horizon Europe are evidence that both parties can work through their respective concerns where official lines of strategic dialogue are open.

Taking account of the marked change in the global geopolitical context, the EU and UK should move to exercise a similar proactive approach to exploring opportunities for defence industrial cooperation. Upcoming elections in the EU and UK will provide an opportunity to reset political and institutional relations on defence, regardless of their outcome.

European industry sees European defence as including the UK. The concept of European strategic autonomy, with reference to geographic Europe and therefore inclusive of the UK, centred on a Europe that seeks to do more to defend itself, must replace the more limited current concept of EU strategic autonomy. This can only be truly achieved through a broader EU-UK defence and security arrangement, including (but not limited to):

1. A regular and formalised EU-UK Defence Dialogue to discuss ways to practically strengthen European co-operation with the involvement of the European defence industry. This would hold at its core the desire to seek a more structured and comprehensive EU-UK defence industrial cooperation framework;
2. A UK Administrative Agreement with the European Defence Agency (EDA); Providing an additional forum of exchange and dialogue and growing activities of cooperation to regulation and supply chain projects lead by the EDA;

3. A special and sustainable EU-UK agreement on Permanent Structured Cooperation (PESCO) and the European Defence Fund (EDF), unlocking avenues for closer alignment on joint Research and Development (R&D) and procurement – on a case by case basis - to the benefit of European defence industrial co-operation. This may also look to include UK financial compensation or clawback mechanisms in these programmes and projects, similar to the Horizon Europe agreement;
4. Seamless, reciprocal access to the EU and UK defence markets and programmes, including potential EDIP projects such as the Structure for European Armament Programme (SEAP);
5. A streamlined, defence and security specific approach to enabling the transfer of people and skills to and from the EU and UK to increase the viability of European defence co-operation, and recognising the significant benefits to be achieved for European security;
6. A joint comprehensive review of customs, exports, and regulatory barriers that limit defence industrial co-operation within the wider economic relationship;
7. Cooperation with European financial institutions and investment funds on supporting banking, finance and capitalisation for the defence sector, including enhanced dialogue on ESG regulations.
8. Improved NATO-EU co-operation to prevent duplication of European defence industrial co-operation initiatives.

The British Chamber of Commerce EU & Belgium conclude that these recommendations are essential to accelerating European defence industrial co-operation and maximising European security perspectives.





The British Chamber of Commerce EU & Belgium Defence & Security Committee

The British Chamber of Commerce EU & Belgium (BritCham) is a non-profit European business association based in Brussels. The Chamber develops mutually beneficial policies and activities involving corporations and institutions across Europe.

In 2023 the Chamber established a new Defence and Security Committee to respond to concerns amongst European industry about the reduction in and barriers to EU-UK defence collaboration.

BritCham now provides a unique platform for international industry, business and policy makers to discuss the ever-evolving challenges of the defence industry in both the EU and the UK. It focuses on a plethora of critical policy areas, including land, sea, air and space capabilities, emerging & disruptive technologies (EDTs), such as artificial intelligence (AI) and cyber, defence procurement and cooperation.

The committee, including over 40 European participant companies, provides insights and expertise to create dialogue around these key areas, bringing key stakeholders together to solve complex issues.

Our Call for Evidence

To address many of the issues already raised, we have approached this report through a comprehensive call for evidence to the defence industry. The question posed to industry was simple, allowing for a variety of submissions to take place:

What barriers or issues has your company faced, affected by or stemming from issues associated to the EU-UK relationship? And what impact have these had on your ability to effectively trade and/ or collaborate with business in the UK or elsewhere in Europe?

In total, the British Chamber of Commerce, with the help of members of the Committee were in direct communication with 482 Companies, from all EU Member States, European NATO Allies, and additionally neutral states. Additionally, with the help of defence trade associations, we broadened our call across those specific countries.

Overall, around a third of submissions were received from the UK, with the remaining being from Europe, including non-EU members.



Driving European Industrial Collaboration



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