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Europe

Course of The Integration of Europe

Lobbying Adaptation in the Defence Industry

*The cases of Leonardo, Airbus and the Aerospace and
Defence Industries Association of Europe*

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Abstract

The European Union has historically played a marginal role in defence, with lobbying efforts primarily conducted through national governments. Since 2016, however, initiatives such as the European Defence Fund have opened supranational channels for lobbying, raising the question of how the defence industry has adapted to this institutional shift. Scholarship highlights financial and organisational resources as key drivers of Europeanisation, and growing research underscores the role of domestic embeddedness and relational networks in shaping how interest groups adapt. This thesis examines how these factors interact in the defence sector by analysing three case studies: Leonardo, Airbus, and the Aerospace and Defence Industries Association of Europe (ASD). Using process tracing and pattern matching, the study finds that adaptation has been significant but uneven. Leonardo adopted a hybrid strategy, expanding its EU presence while relying heavily on national channels. Airbus exhibits a more substantial degree of Europeanisation, investing more resources in Brussels lobbying and engaging across various institutional arenas. ASD, as an umbrella association, embodies the Europeanisation of the industry itself, leveraging broad membership and networks to influence policy at multiple stages. Overall, the findings demonstrate that Europeanisation in defence lobbying is shaped not only by institutional developments in Brussels but also by firms' structural resources, national ties, and organisational features.

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1. Introduction

Since the earlier stages of European integration, scholars have studied and analysed lobbying behaviours in Europe, due to its *sui generis* institutional architecture (Woll, 2002) and the peculiarity of its integration process. Indeed, lobbying has become an integral part of the European Union's (EU) policy-making process, thereby attracting considerable academic attention. The EU's multi-level governance structure, its technocratic nature and the dispersion of competences among different institutions and with the Member States allow for a variety of access points for interest groups (Hooghe and Marks, 2001; Coen and Richardson, 2009). For these reasons, scholars have demonstrated that industries and interest groups allocate significant resources to lobbying European institutions, both at the supranational level - the Commission and the Parliament - and at the intergovernmental level - the Council (see, among others, Eising, 2007; Coen, 2007). While lobbying in areas such as environment, trade, or agriculture has been historically consistent and well-documented in the literature, defence lobbying has always stood apart. Until recently, Member States have consistently gatekept their competencies in this matter, thus impeding the European integration process.

This situation has undergone profound changes over the past decade. The EU institutions have gained actorness in relevant defence-related policies, marking, according to some scholars (Haroche, 2020), a substantial shift from a strictly intergovernmental arena to a more supranational one. Indeed, the establishment of EU defence initiatives since 2016 - notably the European Defence Fund and related programs - represented a significant shift in governance, opening Brussels as a new venue for defence-related lobbying. As the Commission gained more political entrepreneurship (Håkansson, 2021), interest groups sought to adapt to the new institutional and political landscape, devoting more funds to European lobbying and "sending their big guns to Brussels" (Wheaton and Bayer, 2023), as Politico titled in 2023. The defence industry has responded to the EU's growing defence role by increasingly engaging with these

institutions. Scholars argue that the EU's technocratic and consensus-driven structure can be particularly favourable for business lobbying, since technical expertise and concentrated interests often carry weight in Brussels policy debates (Berkhout, Hanegraaf, and Braun 2017). This is especially true in sensitive sectors, such as defence, where public attention is diffuse and industry expertise is in high demand. In short, the EU's venture into defence policy has created a new playing field for lobbyists, incentivising defence firms to "venue shop" at the supranational level alongside their national advocacy efforts.

This thesis examines how the defence sector adapted its lobbying strategies to this increasingly integrated environment. Aiming to understand whether and how the leading actors in the field have changed their organisational features and behaviours, the central research question is:

To what extent has the defence industry adapted its lobbying behaviours to the EU's growing defence role in defence-related policy and funding since 2016?

By addressing this research question, the thesis aims to contribute to expanding the literature on lobbying in a sector where the process of European integration and supranationalisation is recent and still contested (Håkansson, 2021; Hoeffler, 2023).

The thesis grounds its main theoretical perspectives in the lobbying literature, applying them to the defence industry sector. First, the concept of venue-shopping highlights how interest groups strategically select the access point that best suits their interests, thereby determining the recipient of their lobbying efforts (Baumgartner, 2007; Holyoke et al., 2012; Coen, 2007). Relatedly, Bouwen's (2002) access goods theory illustrates how lobbying constitutes a bilateral exchange in which interest groups provide information or knowledge in exchange for access. The academic literature on the Europeanisation of lobbying complements these perspectives by outlining the main drivers behind establishing a Brussels presence, explaining the role of

resources and the domestic institutional framework in the choice of European venues (Klüver, 2010; Dür and Mateo, 2014; Pritoni, 2020).

Moreover, it builds on the existing literature on defence lobbying and on the European industrial sectoral landscape. Specifically, it draws on the literature that outlines the main actors and their network of relations (Ruiz et al, 2016; Calcara, 2017a, 2017b). According to these findings, the Brussels lobbying landscape is dominated by a relatively small number of actors who enjoy privileged access to the institutions and shape crucial policy initiatives (Muravska, 2014). Accordingly, the thesis analyses three emblematic and exemplificative cases: Leonardo, an Italian national champion with strong ties with the national government; Airbus, a trans-European firm with partial ownership from multiple EU governments; and the Aerospace Security and Defence Industries Association of Europe (ASD), the umbrella association representing almost all the defence actors in Europe.

Methodologically, the research employs process tracing and pattern matching (Voltolini, 2016; Dür, 2008) to analyse the consequentiality of the actions and to prove efficiently how the companies adapt to the institutional shift. By testing the hypotheses drawn from the literature, this thesis aims to provide insights despite the limitations associated with the small-N design, the absence of statistical analysis, and the opacity of the field.

The structure of the thesis follows. Chapter 2 reviews the literature and presents the main theoretical pillars that underpin the thesis, drawing on existing research. Chapter 3 is dedicated to the methodological approach, outlining the research design, case selection, and the operationalisation of the available data. Chapter 4 presents the empirical analysis of Leonardo, Airbus and ASD. Finally, Chapter 5 discusses the findings and concludes the thesis.

2. Literature Review and Theoretical Framework

2.1. Historical Background and Institutional Framework

In the first section of the literature review, the thesis will provide a historical framework, contextualising the latest developments in the field of European defence. By doing so, it is possible to properly define the increase in EU capabilities and accurately trace the processes that led to the current institutional framework, while also assessing the magnitude of these developments.

The European Union's role in defence has evolved through distinct historical phases, shaped and characterised by failed experiments, differing perspectives among member states, and gradual, yet partial, institutionalisation to this day. In the early stages of the EU, the literature focused on the lack of integration in the field, suggesting other means through which the EU could exercise its power. A clear example is provided by Duchêne (1972), who described the EU as "civilian power," highlighting its global reach despite military limitations (Duchêne, 1972: 19-20). Various interpretations of the EU's actorness have emerged, converging on the notion of a lack of reliance on hard power. This conception persists today, with the most recognised depiction of EU foreign policy relating to its ability to shape norms in international fora - hence the concept of "Normative Power Europe" (Manners, 2002) – or to influence and shape global economic governance due to the size of its market (Damro, 2012). However, these formulations of the EU's international posture must rest on the assumption of the lack of an integrated policy in this sense.

Several observers argued that the shortcomings of a coherent foreign policy could hinder European actorness. For example, Duchêne's concept of "civilian power", was critiqued by Bull (1982), who challenged the EU's non-military orientation. Bull argued that Europe could not attain complete independence without coordinated military capabilities, remaining dependent on the United States for defence (Bull, 1982). Menon (1996) similarly noted that,

prior to the Maastricht Treaty, European defence was predominantly managed by NATO, which impeded strategic autonomy and segregated defence governance from the integration process. Therefore, the transition toward greater European capabilities in defence represents a distinct and crucial step in European integration, enabling the EU to assert independent international actorness (Rhinard and Sjöstedt, 2019). The transition toward greater defence integration is not only strategically important for the EU, but also crucial to the scope of the thesis, as it is institutionally transformative and shifts what was previously an exclusively intergovernmental competence to the European Union.

As Schuman famously emphasised in the declaration that bears his name, “Europe will not be made all at once, or according to a single plan. It will be built through concrete achievements which first create a de facto solidarity.” (Schuman, 1950). This declaration, which laid the foundation for the European Coal and Steel Community (ECSC), proved itself also, if not especially, in the field of defence. The first, yet failed, attempt to achieve European integration was outlined in the Pléven plan of 1952. The plan envisioned a supranational European Defence Community (EDC) to comprehensively integrate a defensive framework among the six members of the ECSC (Trybus, 2006). Based on the same organisational foundation as the ECSC, the EDC involved the creation of a supranational army, an independent administration, a dedicated budget, and permanent military structures. However, as suggested by Gavin (2010), the misalignment of interests among the various actors involved, along with the aforementioned dependence on the United States (Menon, 1996), contributed to the plan's failure due to the French parliament's vote against it.

On the contrary, the first success in the field was represented by the Maastricht Treaty, signed in 1992 and ratified in 1993. The Maastricht Treaty (Treaty on European Union, TEU, 1992), which established the EU and shaped it in its current form, introduced the Common Foreign and Security Policy (CFSP) as a pillar. However, it was largely declaratory and limited in scope

due to its intergovernmental nature (Taylor, 1994), representing a setback when compared with the supranational project of the EDC. Nonetheless, the provisions laid out in the Maastricht treaty represented a crucial step in giving the newly created EU concrete ambitions in the defence field. The Treaty committed, in its general provisions, the Union to: “to assert its identity on the international scene, in particular through the implementation of a common foreign and security policy including the eventual framing of a common defence policy, which might in time lead to a common defence” (TEU, 1992: Title I, Article B). However, the configuration of the treaty remained intergovernmental and national ministries and governments remained the key actors, with a limited role for the Commission.

The Maastricht Treaty was followed by other, crucial legislative milestones. The Treaty of Amsterdam, signed in 1997 and effective in 1999, represented an incremental, but significant step in strengthening the CFSP. Amending the Treaty of Maastricht, the 1997 Amsterdam Treaty strengthened cooperation by allowing common strategies and joint actions and explicitly including the development of a standard defence policy within the pillar’s framework (TEU, 1997). However, as noted by Devuyst (1998), the amendment retained the intergovernmental features of Maastricht, as the reluctant member states were able to pose the veto by requiring the unanimity for “important and stated reasons of national policy”. The Amsterdam Treaty, however, introduced constructive abstention and the possibility of resorting to the EU Council in the case of a veto posed by a Member State (European Union, n.d.).

Politically, the most remarkable turning point was represented by the Saint-Malo declaration, signed in December 1998 by the British Prime Minister, Tony Blair, and the French President, Jacques Chirac. The “Joint Declaration on European Defence”, issued at the British-French Summit, stated that “the Union must have the capacity for autonomous action, backed up by credible military forces, the means to decide to use them, and a readiness to do so, in order to respond to international crises.” (Franco–British St. Malo Declaration, 1998). Since the

declaration's immediate aftermath, scholars and observers had labelled it as a pivotal moment for European defence capability (Mathiopoulos and Gyarmati, 1999). However, Peter Ricketts, who served as Chair of the Joint Intelligence Committee and was a key figure in the negotiations of the declaration, explains in an insightful article how the geopolitical context of the early 2000s – the 9/11 attacks and subsequent attacks in Afghanistan and Iraq – pushed European defence away from the agenda (Ricketts, 2017).

Another important moment, despite not being legislatively foundational like the Maastricht and Amsterdam treaties, and politically influential like the Saint-Malo declaration, is marked by the creation of the European Defence Agency (EDA) in 2004 (Council of the EU, 2004). Although intergovernmental, being under the institutional hegemony of the Council, the EDA facilitated diverse institutional visions, including supranationalism, intergovernmentalism, and Euro-Atlanticist perspectives (Bátora, 2009). In practical terms, the EDA functioned as an intergovernmental coordination forum, allowing access essentially through member-state delegations and structured dialogues, rather than through Commission-led rule-making.

The last constitutional moment before the period under analysis is represented by the Lisbon Treaty, signed in 2007 and effective in 2009, another amending treaty. The Treaty formally established the Common Security and Defence Policy (CSDP), embedded in the CFSP. The treaty bears some fundamental innovations, despite being “much more modest and in line with the EU's nature” (Ricketts, 2017) than the possibilities enshrined in the Saint-Malo declaration. Amending the Maastricht and Amsterdam Treaties, the Lisbon Treaty introduced the CSDP, positioning it between Articles 42 and 46 of the consolidated version of the TEU. Most notably, it contains the mutual defence clause, in Article 42.7, the organisation and scope of work of the EDA in Article 45 and the establishment of a Permanent Structured Cooperation in Article 46 (TEU, 2007). The introduction of CSDP and the combination of its measures represent a turning point, despite maintaining the intergovernmental character and presenting some

drawbacks. For example, Virkunen (2020) notes how, despite the mutual defence clause obliging all member states to render aid to a member state victim of an aggression, the EU lacked the necessary level of operationalisation, meaning that the support would have to be organised bilaterally. Similarly, PESCO enshrines the possibility of defence cooperation among willing Member States, without any obligation. However, the initiative has still been described as a profound “game changer”, able to blend “new intergovernmentalism, new supranationalism, and neo-functionalism” (Blockmans and Crosson, 2021: 107) together and significantly changing the basis of European integration .

This thesis focuses specifically on developments since 2016. A critical turning point occurred that year with the introduction of the European Global Strategy (EUGS). Negotiated over two years, as documented by Tocci (2016), the strategy was published by the EU Council immediately following the Brexit referendum. As emphasised by Morillas (2020), the EUGS demonstrated a novel internal negotiation process wherein Mogherini, holding the dual role of High Representative and Vice President of the European Commission (HR/VP), leveraged her Council-derived intergovernmental mandate to develop the strategy autonomously.

What is likely the most crucial development for the scope of the thesis, however, is the European Defence Fund (EDF), which generated a substantial body of literature and represents the most profound shift toward more comprehensive integration. Launched in 2016, the EDF comprised two distinct financing structures (European Commission, 2016): one aimed at funding collaborative defence research and the other intended to support joint development of defence capabilities. Håkansson (2021) challenged intergovernmental interpretations of the EDF by emphasising the Commission’s “political entrepreneurship”. In his analysis of EDF negotiation processes, the author describes how catalytic events - the geopolitical situation, Trump’s first administration, and the migration crisis - required a more integrated approach to EU defence. Among his study’s key findings is the blurring distinction between

intergovernmentalism and supranationalism in defence and social policy areas. A similar perspective is offered by Haroche (2020), who characterises the EDF as a supranational turn opposing the new intergovernmentalist approach exemplified by entities like the EDA. Hoeffler (2023) provides an intriguing yet somewhat contrasting viewpoint. Acknowledging that the EDF marked a significant shift toward greater Commission involvement in capacity-building, the author notes that ultimate authority in defence remains with the states (Hoeffler, 2023). Therefore, the EDF must be considered a hybrid mechanism: it is a policy instrument shifting the scope toward military capacity-building, but it remains somewhat peripheral. Consequently, the EDF is viewed primarily as a financial tool, with the Commission acting as a facilitator rather than a primary sponsor. Sabatino (2022) also addresses the economic significance of the EDF, framing it not merely as a transformative force in military cooperation but predominantly as a step toward industrial collaboration and the creation of a single market for defence - a complete innovation within the EU framework.

The final critical development is the Act in Support of Ammunition Production (ASAP), a regulation enacted by the Commission in 2023 aimed at bolstering production capabilities and providing support to Ukraine in its conflict with Russia. Fabbrini (2024) examines how the Commission utilised existing Treaty provisions to secure, albeit limited, authority to allocate EU budgetary resources to the defence sector, thereby positioning itself as an influential actor within the EU defence industry.

A comprehensive understanding of EU integration in defence, alongside the surrounding literature, is essential to the scope of this thesis. Indeed, the partial - or, as some scholars suggest, more radical - shift towards a more supranational role for the Commission also entails a transformation in the principal actors and, by extension, the venues where interests are most effectively represented. The literature highlights the complexity of EU integration, demonstrating how competences in defence governance - both industrial and related to military

capacity-building - are frequently shared or, at the very least, blurred between intergovernmentalism and emerging forms of supranationalism. Nonetheless, there is broad consensus in the literature on one key point: over the past decade, the EU has significantly expanded its role in defence.

2.2. Venue Shopping and Access Goods Theory

The EU's architecture is characterised by a multi-level governance, wherein specific competencies and policy-making initiatives are dispersed across supranational and intergovernmental institutions (Hooghe and Marks, 2001). This dispersion creates a variety of possible policy venues - i.e. institutional decision arenas - that interest groups can target, strategically selecting the access point that most effectively aligns with their policy goals (Baumgartner, 2007). This process takes the name of "venue shopping", widely discussed in the literature and defined by Holyoke et al. (2012) as "the choices of interest group advocates regarding which policy-making institutions will be on the receiving end of their advocacy" (Holyoke et al, 2012: 9). Owing to the EU's *sui generis* institutional architecture (Woll, 2002), interest groups can engage with multiple levels of governance, choosing their lobbying targets based on the receptiveness of specific institutions, the stage of the policy process (Coen, 2007), and the particular access goods they can offer (Bouwen, 2002).

As competences have gradually shifted from national capitals to Brussels since the 1990s, interest groups have been increasingly required to develop a more nuanced understanding of the EU's institutional landscape. Rather than defaulting to national-level lobbying, they must now make deliberate and strategic decisions about which institutional venues are most advantageous for their goals. Applying this theoretical lens to the defence sector involves a further distinction between intergovernmental lobbying - targeting Member States, the Council, or the European Council - and supranational lobbying directed at the European Commission.

Pakull et al. (2020), building on the existing literature, note how business groups have two different ways to proceed: on the one hand, they can pursue the “national route”, hence lobbying the national institutions to influence European policymaking, on the other, they can opt for the “Brussels route”, targeting actors at the supranational level (i.e. the Commission). Hence, they proceed to analyse the different venues, explaining how various institutions will necessarily require different types of lobbying behaviours. Regarding the Brussels venue, it is essential to distinguish and address each institution separately. In their book “Lobbying the European Union: Institutions, Actors, and Issues”, Coen and Richardson (2009) offer a comprehensive analysis of each EU institution, treating them individually to understand the kinds of lobbying strategies they are most likely to respond to. Their analysis is grounded in factors such as each institution’s role in policy formulation, its organisational structure, its demand for specialised expertise, and its stage of institutional development.

Moreover, it is crucial to investigate both the demand and supply sides of lobbying (Coen, 2007; Bouwen, 2002). As theorised by Bouwen (2002), lobbying should not be seen as a one-sided effort by interest groups, but rather as a bilateral exchange. Interest groups provide what Bouwen calls "access goods" - resources like expert knowledge, insights into specific sectoral needs, and information about national market dynamics (Bouwen, 2002: 369). The hypothesis derived from this theory suggests that institutions vary in the type of access goods they require, depending on their specific roles and structures within the policy-making process. Consequently, the choice of lobbying venue is based on a strategic calculation by private actors, aligned with the particular access goods they can offer. It follows that interest groups will select the venue based on both the institutional characteristics of the specific locus and the characteristics of the group itself, as well as the type of access goods it can provide.

Accordingly, it is also important to consider that interests can be expressed through national channels. Coen (2007) and Bouwen (2004) argue that, despite the paramount importance of the Council of Ministers as a central focus of political activity, lobbying efforts are limited through the Council Secretariat or the Committee of Permanent Representatives (COREPER) (Coen, 2007). On the contrary, interests are expressed in the Council of Ministers through national routes, entering the EU political arena through national representatives. These differences across institutions and their inter-institutional dynamics are highly relevant for this thesis. For example, when examining lobbying directed at the Commission, the literature highlights how commissioners or senior officials within Directorates-General (DGs) may maintain connections with their home countries, which can influence access and shape outcomes (Wonka, 2008). Similarly, lobbying efforts targeting the Council or Parliament must take into account their intergovernmental character and stronger ties to electoral constituencies. Dür and de Bièvre (2007) also contribute to this analysis by arguing that the EU's technocratic structure and limited engagement with a broader constituency make it particularly favourable for business and concentrated interests, especially in sensitive sectors such as defence.

2.3. Europeanisation of Lobbying

The Europeanisation of lobbying captures the dynamics through which interest groups adapt structurally and behaviourally to the opportunities created by EU institutional developments. In other words, applying this concept to this specific framework involves examining the adaptation of interest groups to the Brussels political arena.

One of the clearest insights emerging from this literature is the centrality of resources. Financial means, organisational capacity, and technical expertise are consistently highlighted as fundamental preconditions for sustained lobbying in Brussels (Klüver, 2010; Dür and Mateo, 2014). Resource-rich groups are more likely to Europeanise their lobbying efforts, establishing

offices, employing specialised staff, and systematically monitoring EU legislation (Dür and Mateo, 2014), whereas resource-poor associations tend to remain primarily focused on the domestic arena (Beyers and Kerremans, 2007; Kröger, 2018). However, research also demonstrates that resources alone are not sufficient to explain why some groups Europeanise while others do not (Pritoni, 2020; Kröger, 2018). Pritoni (2020) points out other crucial elements: in analysing the Italian interest group landscape, he highlights the importance of the domestic relational network. If financial endowment is undoubtedly a major predictor of the possibility of choosing Brussels as a lobbying venue, relational resources are also of crucial importance. Indeed, among the most critical findings is the testing of the compensation hypothesis, postulated by Beyers (2002): groups with a weaker position in the national arena will attempt to access Brussels more frequently. However, as demonstrated by the case study, they often fail to do so. The conclusion is that relational resources are another crucial predictor, as groups with stronger ties with the domestic arena will obtain easier access to the European one through intergovernmental structures. This aligns with findings that Europeanisation is limited not only by resource constraints but also by the way groups are embedded in domestic systems (Beyers, 2002; Beyers and Kerremans, 2007).

Domestic institutional contexts play a crucial role in conditioning whether financial or relational resource endowments translate into EU engagement (Klüver, 2010; Eising, 2007). As demonstrated by Klüver (2010), corporatist systems, in which associations are closely integrated into policymaking, offer more substantial incentives for groups to expand their activities to Brussels. In contrast, fragmented or statist systems constrain adaptation. This explains why German associations were more able to spill over to the EU than French groups, despite similar resource levels (Klüver, 2010). A large-N study reinforces this point: Dür and Mateo (2014), analysing over 880 cases across five countries, show that business groups are consistently more Europeanised than others, but only when they are resource-rich. Moreover,

they demonstrate that policy fields matter: lobbying is more Europeanised in agriculture, trade, or environmental regulation, where EU competences are strong, while nationally dominated sectors remain domestically focused (Dür and Mateo, 2014). All of these findings are directly related to the central theme of the thesis. Indeed, one of the core hypotheses is that, despite being traditionally a strictly intergovernmental and nationally dominated policy field, defence became gradually more critical on the communitarian agenda, forcing resource-rich business groups in the field to Europeanise their lobbying efforts.

Similarly to Pritoni (2020), Beyers (2002) demonstrates that groups central in domestic policy networks are more likely to Europeanise, while diffuse public-interest organisations remain disadvantaged. This reinforces the persistent structural bias in favour of business interests (Dür and Mateo, 2014). Further, Beyers and Kerremans (2007) argue that “critical resource dependencies” on member and subsidies ties can actively limit Europeanisation, even for well-endowed groups. Where organisations depend heavily on domestic sponsors or members, they often lack the autonomy to reorient towards Brussels (Beyers and Kerremans, 2007). Accordingly, Pritoni (2020) used the case study of Italy also to argue that, even when groups have the resources to shift venue to the European institutions, they might be reluctant to do so - another crucial descriptive finding is that Italian associations tend to stay national rather than Europeanise their interests - and to convey their interests in the communitarian arena through national representatives.

Aligning this with “the access goods” theory (Bouwen, 2002), attention must also be directed to the demand side of lobbying, where EU institutions themselves filter access (Eising, 2007). As stated in section 2.3, the Commission prioritises technical expertise; in contrast, the European Parliament is more receptive to diverse interests, as every institution will require a specific type of access to goods. Segmentation requires groups to adapt their strategies to

multiple logics of consultation (Eising, 2007). Hence, interest groups possessing the specific access goods will be better suited to Europeanise their interests and choose the best venue, or acquire the necessary expertise to do so.

Taken together, this scholarship suggests that Europeanisation is a contingent and uneven process shaped by resources (Klüver, 2010; Dür and Mateo, 2014), domestic context (Beyers, 2002; Beyers and Kerremans, 2007), relational contexts (Pritoni, 2020) and the demand side of lobbying (Eising, 2007; Bouwen, 2002). The process of Europeanisation of lobbying in the defence industry, which is one of the main hypotheses of the thesis, cannot disregard those factors. Indeed, analysing the institutional development of the EU and the possible venues for lobbying efforts is not sufficient to obtain the whole picture: the drivers behind the process of Europeanisation of defence-related lobbying are also fundamental.

2.4. European Defence Market and Lobbying

The final part of the literature review, therefore, surveys the scholarship directly relevant to the thesis - namely, the development of the European defence market and the strategies of defence industry lobbying - to derive concrete implications and set the stage for the subsequent empirical analysis.

Existing research, despite not being extremely broad on the relation between the development of the EU defence market and lobbying, highlights the tension between integration and sovereignty (Hoeffler, 2023; Mueller, 2025a), and seeks to explain the role of lobbying in mediating this tension (Gentilucci, 2014; Ruiz et al., 2016). Business groups, industry actors and associations, as well as member states, deploy lobbying strategies to shape the core regulations on funding and on procurement (Shapovalova, 2015). The literature therefore suggests that the development of the European defence market is shaped, among other factors, by lobbying efforts.

A consistent theme across this body of work is that the EU defence market has developed in a particular fashion: unlike other single market domains, the one under analysis is quite fragmented, hence offering multiple venues and access points, and creating several opportunities. Mueller (2025a), conducting a holistic meta-synthesis of the literature, aims to demonstrate, from a strictly economic perspective, the development of the defence market, emphasising how duplication of competencies in the field is highly inefficient. According to the paper, through more cooperation in defence procurement and research, up to 30% of the current €290 billion of the Member States' budget could be saved (Mueller, 2025b). Instead of efficiency, Member States tend to preserve their national competencies (Mueller, 2025b), increasing lobbying venues and opportunities for private interests. This results in often hybrid outcomes (see section 2.2), where different interests compete for different results (Hoeffler, 2023).

The analysis of the literature review on EU lobbying in the defence sector cannot be conducted without considering the insights by Muravska (2014), Calvo Rufanges (2016), Ruiz et al. (2016), and Calcara (2017a, 2017b). By the combination of this literature, it is possible to obtain a precise picture of the actors active in the field, as well as the institutional and economic dimensions of lobbying influence.

A first theme concerns the actors who lobby in the EU and the networks through which they do so. Research consistently highlights that the defence lobbying landscape in Brussels is dominated by a relatively small number of powerful actors. Large firms such as Airbus, Thales, BAE Systems, and Leonardo, alongside the Aerospace and Defence Industries Association of Europe (ASD), occupy central positions in EU policy networks (Ruiz et al. 2016). Drawing on a network analysis of 389 organisations listed in the EU Transparency Register, Ruiz et al. (2016) demonstrate that influence primarily rests on network centrality rather than on formal

coalitions, diverging from the traditional lobbying literature, which correlates coalition building with influence (Hanegraaff and Pritoni, 2019). Among the most important findings, there is the position of ASD, which occupies the highest degree of centrality and, according to the research, enjoys greater access and influence. These lobbying activities converge around institutional focal points, most notably the European Defence Agency (EDA), which provides a key venue for both industry and governments to interact on procurement, research, and capability development (Calcara, 2017a, 2017b). The design of the Agency itself reflected diverse national preferences, whose analysis shows how Member States managed to convey their interests in the earlier stages of integration: France sought a strongly industry-oriented agency that could promote research and strengthen the defence technological and industrial base, while the UK pushed for a capability-oriented body focused on efficiency and interoperability (Calcara, 2017a). Italy, during its Presidency of the Council in 2003, acted as a mediator between these positions, helping to establish an institutional compromise that integrated both dimensions (Calcara, 2017b). These first stages reveal how institutional outcomes are themselves shaped by lobbying preferences, with states and firms seeking to structure the Agency in ways that reflected their own domestic political economies. Calcara's (2017a; 2017b) works examine the network of relationships within the domestic political arena, focusing on the connections between Member States, their industries, and the EDA. He highlights the central role of Member States in defence procurement and national regulation, placing particular emphasis on domestic lobbying and identifying national legislators as the most influential actors in shaping defence governance.

Muravska's (2014) contribution represents one of the most complete and insightful on the theme, examining how major private actors - Finmeccanica (now Leonardo), BAE Systems, and Thales - interacted with EU institutions to shape the Defence Procurement Directive (2009), within the broader framework of the European Defence Equipment Market (EDEM).

Her study highlights the importance of distinct stages within the policy cycle, demonstrating how lobbying efforts were strategically targeted at different institutions depending on the phase of negotiation. Throughout her analysis, Muravska consistently highlights the central role of the ASD, which represents the leading industrial players in the sector, echoing the finding of Ruiz et al. (2016) on its centrality and hence making it relevant for the scope of the thesis.

Another crucial contribution is offered by Calvo Rufanges (2016), who provides a deep analysis of defence industrial lobbying in Europe. In his paper, the author enumerates and examines all the actors active in Europe, allocating specific attention to the leading companies and to the ASD, which is considered the main lobby for defence. However, the most crucial insight regards the structural framework within which these actors operate. Calvo Rufanges (2016) situates European lobbying within the context of the military-industrial complex, a network of mutually reinforcing relations between governments, militaries, and the industrial sector. This complex creates a structural alignment of interests, where governments seek security and jobs, militaries demand ever more advanced capabilities, and industries profit from continuous procurement. Within this structure, lobbying reinforces what he terms the military-economic cycle, a process in which the identification of threats justifies increased defence budgets, which then fund research and development, leading to production, procurement, and ultimately arms sales. Each stage of this cycle creates incentives for the next, ensuring that demand for military solutions is continuously reproduced. The economic-military cycle serves as evidence of the continuous and systematic influence of private interests, which can lobby at all stages of the cycle and at various levels.

In conclusion, the literature portrays a defence-industrial lobbying field dominated by a small set of resource-rich business groups, with ASD as the focal point and major association. Those actors operate in a complex framework, maintaining relations with the national government

and European institutions and agencies (most notably, the EDA). Combined with the post-2016 opening of supranational entry points, this configuration implies the possibility for industries to choose whether to lobby at the national level or to Europeanise their interests. However, the body of literature under analysis bears clear expectations about who adapts to the institutional shift, where lobbying efforts are concentrated, and how interest groups tailor their strategies to convey their preferences more effectively and to the most suitable recipient. The following section will formulate those hypotheses to guide the empirical analysis.

2.5. From theory to testable propositions

Throughout this chapter, the literature review focuses on the main building blocks that are functional for the empirical analysis. Specifically, starting from an overview of the institutional shift, it explains the legal and institutional framework in which lobbying efforts take place. Then, the thesis explores two fundamental theoretical frameworks - venue shopping and the Europeanisation of lobbying - building on existing literature and applying them to the specific topic of the research. Lastly, the chapter concludes with an overview of the defence industry and lobbying, highlighting the leading actors and key features. The research question, already stated in the literature review, follows directly:

To what extent has the defence industry adapted its lobbying behaviours to the EU's growing defence role in defence-related policy and funding since 2016?

From the literature surveyed, several testable expectations emerge.

The primary one, which directly addresses the research question, concerns the twofold dimension of lobbying efforts. Major industries will maintain national advocacy and intergovernmental modalities, utilising national representatives to present their cases to Brussels through these channels; however, it can be expected that resource-rich actors will

integrate domestic lobbying with supranational ones, thereby Europeanising, at least partially, their scope of work.

Some corollary hypotheses stem from the literature review. The first one regards the selection of venues: given that we consider the actors under analysis to be resource-rich, the thesis aims to explain why and how they choose to lobby specific actors, based on the “access goods” available and the stage of the policy-making cycle. Then, drawing on the literature related to actors, the thesis will address the importance of networks and associations, using ASD as a case study.

These expectations yield observable implications for the empirical analysis of Leonardo, Airbus and ASD. Chapter 3 specifies the indicators and data sources used to assess these claims.

3. Methodology

This thesis investigates the extent to which prominent defence actors have adapted their lobbying in response to the EU’s post-2016 turn in defence policy and funding, covered in the previous sections. The research design is grounded in theory and aims to examine how each organisation under analysis developed over time, applying the same criteria. The chosen time period for the study is 2016-2024, with a brief explanation of what happened previously to provide a baseline for comparison.

3.1. Research design

This thesis employs process tracing and pattern matching to examine the expectations developed in Chapter 2.

Dür (2008) presents process tracing as the key method for uncovering causal mechanisms, particularly effective in small-N studies, while cautioning that its findings are more difficult to generalise compared to large-N approaches. Voltolini (2017), insists that process tracing remains essential, since large-N designs overlook causal mechanisms and are ill-suited for contested or data-scarce domains such as EU foreign policy. Furthermore, Eising (2017a), commenting on Voltolini's paper, highlights that process tracing is best applied when analysing "one or a few cases."

Beyers et al. (2008) caution that while case studies illuminate the complexity of EU interest group politics, they often remain descriptive and fragmented. Voltolini (2017) counters that, when combined with process tracing, case studies can capture framing processes in EU lobbying and foreign policy, generating theoretically grounded insights.

In addition, pattern matching, understood as congruence testing, is employed to assess whether observed evidence corresponds to theoretically expected patterns, a method that Dür (2008) recognises as particularly appropriate when statistical identification of causality is not possible.

In line with best practices in the field, evidence is assessed by considering the temporal coincidence and congruence between lobbying steps and policy outcomes (Dür 2008), by aligning lobbying activity with institutional logics and theoretical expectations (Coen 2007), and by tracing issue developments over time to test causal mechanisms (Eising 2017b).

3.2. Case selection

The comparison is designed to address organisational variation in three different case studies that well exemplify the actors at the EU level, capturing how interesting groups adapt and shape their efforts in accordance with the institutional scenario.

The first actor under analysis is Leonardo S.p.A., an Italian publicly controlled company (Leonardo S.p.A., n.d.), with a central position in the national lobbying landscape (Calcara, 2017b). Being a national champion, it has strong ties with the government: the analysis of a similar actor bears significant insights regarding the process of Europeanisation of national industries, testing Beyers' (2002) and Beyers and Kerremans' (2007) theories.

The second one is Airbus, a transnational firm operating across multiple member states (Airbus, n.d.). Widely recognised by the literature as a key actor, three different EU governments partially own Airbus - the Government of France is the major shareholder (10.83%), followed by the Government of Germany (10.82%) and the Government of Spain (4.081%) (MarketScreener, 2025) - representing a consistently different example compared to Leonardo. With a more varied ownership and, by nature, profoundly European, it offers important insights into the process of Europeanisation and into the chosen venues.

The last one is ASD, comprising over 4,000 member companies across Europe (ASD, n.d.) and central to the lobbying dynamics, as widely demonstrated throughout the literature review. ASD can be considered the result of the Europeanisation of lobbying efforts, and represents a key actor in conveying industrial preferences to policymakers. The topic-specific literature on industrial lobbying in Europe highlights its position within the European network (Ruiz et al., 2016) and the leverage it holds as a key central player throughout negotiation processes (Muravska, 2014). The study of a similar actor significantly widens the scope of research, going beyond industrial actors.

3.3. Operationalisation and Sources

The study relies exclusively on publicly available, secondary materials, which are systematically used in EU lobbying research. Alongside the academic papers and research used to back up the findings and to interpret the conclusions correctly, the thesis is built mainly on

the EU Transparency Register (EU Transparency Register, n.d.), on observers and media reports, on the actors' contributions to the policy cycle through position papers, white papers and similar documents and on the public statement released.

Data from the Transparency Register is helpful in assessing organisational changes, as these sources allow for the measurement of structural resources over time, indicating the budget allocated to Brussels lobbying, the establishment of offices, and the number of employees. Moreover, logs of high-level meetings, both with officials of the Commission and of the Parliament, are present in the Transparency Register. Those types of data help assess which venues are lobbied and on which topic, providing valuable insights to track the behavioural adaptation of interest groups. Then, using documents provided by the companies, the thesis is also able to analyse the scope and the modalities of lobbying, understanding the type of information used and the "access goods" deployed by the companies.

3.4. Limitations

The study inevitably faces limitations linked to the nature of publicly available data and the chosen design. The EU Transparency Register - and all observers that base their publications partially or entirely on it (for example, LobbyFacts or Corporate Europe Observatory)- risk overlooking informal lobbying efforts. Dinan (2021) notes that studies based on the Transparency Register risk being incomplete due to its self-reporting nature and potential incompleteness. Moreover, as of 2021, the EU has enforced an Interinstitutional Agreement between the Parliament, the Council, and the Commission on a mandatory transparency register (EU, 2021), making a clear comparison of the data before and after this impossible. However, even the Agreement does not cover all lobbying activities, such as strictly personal meetings, meetings at social events, conciliation, or mediation procedures, among others (see Art. 4 of the Agreement). Another related problem is the absence of national, coherent registers.

Consequently, it is impossible to map domestic efforts of the actors under analysis precisely, or at least it is impossible to do so consistently across different states.

A second limitation concerns the quality of the data: the study does not revolve around statistical analysis and lacks interviews. The insights that those two methodologies could have offered are surely important, but are difficult to apply given the small-N sample and the opaqueness of the case study.

To overcome these limitations, the thesis relies on triangulation across registers, documents, and media, as well as observers' reports, to cross-check evidence. Through this approach, although definitive causal identification cannot be assured due to the lack of statistical measurement, the thesis applies a theoretical and methodological framework consistent with the debates in the EU lobbying literature.

4. Empirical Analysis

4.1 Leonardo S.p.A.

Leonardo S.p.A. - formerly Finmeccanica - is an Italian national champion in the defence sector, and one of the leading companies in Europe (La Repubblica, 2024). Its prominence in the European landscape is highlighted by the literature and media-related reports, which consistently rank the area among the most critical actors in the EU defence industry. Historically, due to its ties with the national government, Leonardo's leadership has been deeply engaged with other European actors: most notably, two distinct CEOs of the company were former presidents of ASD - Antonio Guarguaglini (Calcara, 2017b) and Alessandro Profumo (Akkerman et al., 2022).

Analysing the data from the EU Transparency Register (EU Transparency Register, n.d.), Leonardo S.p.A has been registered since 2009. Among the other information available on the

register, there is the number of employees, five, all of whom are accredited to enter the European Parliament. Leonardo, according to the data, spends between €300,000 and €399,000 on the activities covered by the Transparency Register. In the 2024 fiscal year, the company received grants for €42,335,000, related to three EU projects: Horizon Europe and two Joint Undertakings - Clean Sky and SESAR: both of them are public-private partnerships to develop technologies to cut emissions (Clean Sky, now Clean Aviation) and to modernise air traffic management (SESAR) (EU Clean Aviation, n.d.; EU SESAR 3, n.d.). Another critical set of data, available from the Register, pertains to the main fields of interest declared, ranging from defence-related to civilian-related ones.

What is of particular interest for the research, however, is the increase in lobbying efforts at the European level. According to LobbyFacts, funds allocated to European lobbying increased after 2016, with a reported spending of €250,000 in 2015 and 2016, and a declared cost of €350,000 from 2017 to 2021. After this date, the lobbying costs are reported in a span, ranging from €300,000 to €399,000 (LobbyFacts, n.d). Moreover, as reported also by media reporters, the number of employees in Brussels grew from three to five (Braun and Coi, 2025).

Other crucial insights regarding the lobbying activities carried out by Leonardo can be drawn from the meeting logs with Members of Parliament and the Commissions, despite acknowledging the limitations outlined in Section 3.4. According to the meetings with the Commission, between 2016 and 2024, Leonardo conducted 56 high-level meetings. Of those, the majority focused on cybersecurity, space policy, and civilian aviation; however, 15 of those meetings, to varying extents, concerned European defence (EU Transparency Register, List of Meetings with European Commission, 2025). Moreover, it is worth noting that the majority of the meetings were with senior officers of Italian nationality, which aligns with Wonka's (2008) findings regarding potential ties to the domestic network. Similar results, despite being more

predictable, can be found by examining the meeting logs with Members of the European Parliament. The data available on the Transparency Register only dates back to 2019, showing 26 registered meetings between 2019 and 2024. All but three of the meetings were held with Italian representatives, spanning the entire political spectrum (EU Transparency Register, List of Meetings with Members of the Parliament, 2025). According to this data, we can notice how Leonardo carried out a substantive number of meetings both in the supranational arena and with its national representatives, bringing the more technical interests to the Commission and more general instances to the Parliament (several meetings are registered under the title “Various”, while others are “Introductory meeting”). The limited time span of both databases impedes a thorough analysis of the changes post-2016. Still, it is helpful to understand the choice of lobbying venues and the strong national ties that persist in the institutions.

If official data fail to register those variations to a greater extent, independent observers and media reports provide deeper insights. In 2017, the Corporate Europe Observatory published a report analysing the meetings and the most significant contributions to EU legislation (Corporate Europe Observatory, 2017), observing how Leonardo, among other industrial players, played a crucial role in setting up the defence agenda. Specifically, the report shows a steep increase in the number of meetings both with Members of Parliament and of the Commission between 2014 and 2017. Moreover, it highlights the importance of Leonardo and other representatives of the industries in the Group of Personalities (GoP), a high-level group established by the Commission in 2015, whose members include politicians, academics, think tankers, and CEOs from the most significant companies in the European defence landscape (EDA, 2015). The presence of Leonardo in the GoP is extensively covered in another report, published by the Transnational Institute in 2017. This report provides a highly in-depth analysis, albeit one that is somewhat biased by its ideological connotation. It demonstrates not only that Leonardo was a member of the GoP but also how the GoP strongly influenced the

Commission's proposals, which were copied verbatim from the GoP's position papers, and how being in the GoP significantly increased the share of allocated budget (Akkerman et al., 2022). Moreover, this report also emphasises that Leonardo was among the top recipients of the budget allocated to the Preparatory Action on Defence (PADR) and Research and to the European Industrial Development Plan (EDIDP), suggesting that its role in the GoP and its intrinsic lobbying efforts were among the factors contributing to these allocations.

The domestic lobbying is more difficult to trace, as Italy does not have a unique register for lobbying activities. However, Leonardo maintains high-level ties with the government and with members of the parliament. An exemplificative example is the one reported by Irpi Media, an Italian non-profit investigative journalism centre, in 2021, former Minister of the Interior Marco Minniti was nominated as president of the Med-Or Foundation (Bagnoli and Colluccini, 2021). The Foundation seeks to promote cultural initiatives in the Mediterranean and Northern Africa regions, as well as in the Near and Far East, and was created by Leonardo in 2021. (MedOr, 2021). As of today, its chairmanship and management encompass, alongside Minniti and Cingolani (Leonardo's current CEO), representatives of the Governments and CEOs from strategic national firms. Although MedOr is an example, it represents precisely the centrality of Leonardo in the national network. The constant "revolving doors" between Leonardo and the highest sphere of Italian politics are exemplified by the current CEO, Roberto Cingolani, appointed in 2023, and, among other institutional posts, former Minister of Ecological Transition from 2021 to 2022 (Leonardo, n.d.).

4.2 Airbus SE

Airbus SE is Europe's leading aeronautics and space company (Airbus, n.d), listed on the Paris Stock Exchange, the Frankfurt Stock Exchange and the Spanish Stock Exchange (Airbus, n.d). The company is often hailed as one of the most successful European projects, showcasing the

continuous cooperation between France and Germany (Wehrmann, 2023). Indeed, despite being legally based in the Netherlands (Airbus, n.d.), Airbus was founded in the 1960s through the merger of different European industries, mainly from France and Germany (Airbus, n.d.), and maintained strong ties with the national governments of these two countries, which today represent the two major shareholders (MarketScreener, 2025). Airbus is central to defence-related literature and has often been a target for independent reports and NGOs' investigations.

Airbus has been registered in the EU Transparency Register since 2008. According to the Register, Airbus's annual spending ranges between €2,000,000 and € 2,244,999 for the activity covered by the register, and employs thirteen people, with a full-time equivalent of six. However, only two are accredited for access to the Parliament: the Head of EU Affairs and the Head of EU/NATO Public Affairs for Defence and Space (Airbus, n.d; EU Transparency Register, n.d.). The small number of accredited people might be traceable to the use of intermediaries, namely Forward Global (representation costs: €200,000-€299,999 annually) and Logos Public Affairs (representation costs: €100,000-€199,999 annually), to convey their interests (Braun and Coi, 2025; EU Transparency Register, n.d.). According to the Transparency Register, Airbus's fields of interest are extensive, spanning from strictly civilian ones related to the commercial aviation sector to defence-related ones. Moreover, Airbus is a member of several subgroups, expert groups, and advisory boards within the Commission.

To trace the variation in lobbying spending and efforts, it is necessary to consult LobbyFacts, which registers extremely heterogeneous spending throughout the years, with a peak in 2012, with €4,375,000 lobbying costs (LobbyFacts, n.d.). Those data are to be contextualised within the specific framework of Airbus, which, supposedly, used intermediaries throughout the years, to acquire further expertise. Indeed, independent reports demonstrate their crucial role in shaping the legislation, showing how they consistently spent to lobby European venues,

resulting the highest-spending firm in the sector (Corporate Europe Observatory, 2017). Moreover, their influence is even more demonstrable when analysing their meeting logs: according to data retrieved from the EU Transparency Register, they held 348 high-level meetings with the Commission (EU Transparency Register, List of Meetings with European Commission, 2025). Of those, 263 were in the period under analysis, and 46 were related to defence and security to varying extents, while the others were associated with the civilian interests of the firms. The number of defence-related meetings positions Airbus as the most active player in this regard (Baronio, 2023). Moreover, between 2019 and 2025, they held 96 meetings with Members of the Parliament (EU Transparency Register, List of Meetings with Members of the Parliament, 2025). Despite the reduced time span, this data confirms Airbus's predominant position as the most active and influential actor, also considering the meeting logs registered under the intermediaries. From the available data, it can be inferred how Airbus lobbied constantly and to a great extent both the Commission and the Parliament, providing various goods and engaging in all stages of policy formulation. Reports, such as the Transnational Institute's one (Akkerman et al., 2022), also back this statement, demonstrating the revenues in terms of material grants and concessions. Despite receiving far less than Leonardo, Akkerman et al. (2021) reported that Airbus received €10,17 million from the budget allocated between PADR and EDIDP.

Besides the lobbying efforts carried out directly, either through its own lobbyists based in Brussels or through the two intermediaries, Airbus has a strong presence in trans-European groups, both institutional and not. First, its CEO sits in the GoP, thereby enjoying direct channels with the Commission and having the opportunity to participate directly in the agenda-setting stage; in this context, the same conclusions drawn from Leonardo can be inferred. Moreover, Airbus is a member of the Kangaroo Group - Free Movement and Security (Kangaroo Group, 2024). The group brings together representatives from the European

Parliament, Commission, and Council, as well as members of academia, the media, and the business community (Kangaroo Group, n.d.). The group, incorporated under Belgian law as a nonprofit organisation and listed in the EU Transparency Register as a think tank (EU Transparency Register, n.d.), is active in many fields, including defence. The group has exerted its influence since the early 2000s, as reported by Calcara (2020), establishing a Working Group on Security and Defence and having adhering Members of the Parliament tabling questions on multiple occasions (Calcara, 2020).

At the national level, Airbus's lobbying is inherently European. Unlike Leonardo, a single-country champion, Airbus has to coordinate among its home states and can bring its instances into different domestic arenas. According to the website, it has four national offices designated to carry out its public affairs, in addition to its Brussels office: in France, Germany, Spain, and the UK, the countries where the majority of Airbus's operations are carried out. Most notably, in France, Airbus partners with the Government by providing insights and maintaining high levels of interaction; moreover, it represents the first industrial supplier of the Direction générale de l'armement, the French government agency for procurement and military technology (Airbus France Public Affairs, n.d.). In Germany, the UK and Spain, the firm has strong ties with the national government, resulting in many cases as the leading provider of critical military items and maintaining constant relations with public officials and with the political sphere (Airbus Germany Public Affairs, n.d.; Airbus Spain Public Affairs, n.d.; Airbus UK Public Affairs, n.d.). In every country, it has representatives from both the civilian and the defence-related sector, as well as numerous military advisors.

4.3 Aerospace Security and Defence Industries Association of Europe (ASD)

“ASD is the voice of the European Aerospace, Security and Defence Industry” (ASD, n.d.). It is the umbrella association of all industries active in the sector, representing 26 major European

companies (including both Leonardo and Airbus) and 23 National Associations, totalling more than 4,000 companies across 21 European countries (ASD, n.d.). Its centrality in the industry is given not only by its membership but also by the turnover: its members account for 98% of the aerospace and defence industry's turnover in the EU (ASD, n.d.).

Unlike Leonardo and Airbus, ASD represents the interests of the European industry as a whole, being inherently European in nature. As noted by Ruiz et al. (2016), it is no surprise that it is central to the European lobbying network, as it interacts with and represents the interests of all major industries. According to the data available on the EU Transparency Register, ASD registered its interests in a wide array of topics, ranging from Research and innovation to trade, competition and security policy (EU Transparency Register, n.d.). LobbyFacts reports a slight increase in lobbying spending between 2013 (€175,000) and the financial year of 2023 (range: €300,000-€399,999), despite also showing incredibly high expenditure for 2011 and 2012 (€1,625,000) with no lobbyists declared (LobbyFacts, n.d.). From 2014 onward, the company declared an increasing number of lobbyists, although the number was not constant, reaching its peak in 2021 with 14, accounting for 3.5 full-time equivalents. However, the number of accredited people to the Parliament was always significantly higher, with 15 people in 2023. Despite the data not being complete and, in some cases, contradictory, they still demonstrate how ASD has consistently maintained a significant presence in Parliament, with a higher number of accredited individuals than Leonardo and Airbus. The opacity and potential errors in filings are also noted in independent reports and media articles (SpotWapenhandel, 2015), which highlight the discrepancy between the number of accredited lobbyists and the modest expenditure. According to the meeting logs, ASD has carried out 62 meetings with the Commission between 2015 and 2024 (EU Transparency Register, List of Meetings with European Commission, 2025). The meeting logs in the Parliament are incomplete, as registration is reported only from 2022, and only two meetings are reported before 2024,

rendering the data useless for the scope of this research (EU Transparency Register, List of Meetings with Members of the Parliament, 2025). The analysis of the Transparency Register and of the derived sources (LobbyFacts) does not allow for any definitive conclusion, due to the incompleteness of the information and the inconsistencies displayed.

ASD's ability to shape regulations and policy initiatives goes beyond what could be inferred by the Transparency Register. Like Airbus and Leonardo, ASD is a member of the GoP, hence enjoying the same direct access to the institutions. Moreover, as reported in 2017 by the NGO Vredesactie, ASD runs the secretariat of the Sky and Space Intergroup in the European Parliament (Vranken, 2017), a fundamental forum for both formal and informal engagement with Members of Parliament. Moreover, according to this report, ASD has played a crucial role in securing funds, calling for significant investments in research since 2010 (Vranken, 2017). ASD interacted and conveyed its interests to the Parliament Committees and subgroups on multiple occasions, as demonstrated by Akkerman et al. (2022), who report that in 2018, the Secretary General, Jan Pie, was called to brief the Committee on Industry, Research, and Energy on the EDIDB proposal.

ASD can offer multiple access goods: it has a constant pulse of the national industrial landscapes; it can provide the biggest network in the EU, and hence information about every firm and association and, in turn, conveys various and diverse interests, representing the industry as a whole and therefore resulting as a trustworthy interlocutor. Consequently, ASD enjoys access to a variety of access points: through its presence in the GoP, the large number of accredited people and its institutional role, ASD represented a crucial player, as demonstrated also by the literature.

In the next section, the thesis will contextualise the empirical findings in the relevant literature and in the theoretical framework, linking them back to the original research questions and to the hypothesis laid down in Chapter 2.

5. Discussion and Conclusion

The empirical analysis of the three actors chosen demonstrates how the European defence industry has adapted its lobbying strategies in response to the EU's increasing role in defence policy since 2016. However, due to the differences among Leonardo, Airbus, and ASD, the results demonstrated that the intensity and form of adaptation vary significantly. The common denominator is surely a surge in Brussels' expenditures and staffing, as shown by the data reported by LobbyFacts and the EU Transparency register, which coincided with increased influence in the legislative process and funding. The hypotheses laid out in Chapter 2 are therefore confirmed, despite some distinctions. Upon examining the findings, several key insights emerge. The first one, common to Leonardo and Airbus, concerns resources: both actors are well-endowed with financial resources, being among the leading companies in the sector. According to the literature on Europeanisation, this represents a precondition and predictor of Europeanisation (Klüver, 2010; Dür and Mateo, 2014), a finding supported by empirical analysis.

Leonardo illustrates a hybrid strategy, strengthening its EU-level presence but integrating it with the national side. Leonardo increased its declared EU lobbying expenditure, employed more lobbyists and participated in numerous meetings, both with the Commission and with the Parliament. However, the analysis of these meetings reveals a firm reliance on Italian nationals, reflecting the country's centrality and influence in the domestic arena. This insight is not corroborated only by the meeting with Members of the Parliament, but also by high-level officials at the Commission, mirroring Wonka's (2008) findings on how senior officials might

maintain stronger ties with their constituencies. Profoundly embedded in national dynamics, Leonardo mirrored those ties in its Brussels advocacy, demonstrating the importance of domestic context, which inevitably shapes the Europeanisation process (Beyers, 2002; Beyers and Kerremans, 2007; Pritoni, 2020). Leonardo maintained a strong, consolidated national lobbying venue, characterised by strong ties with the Government, as exemplified by the Med-Or foundation and by the revolving doors. Accordingly, as demonstrated also by Calcara (2017b), Leonardo has been able to convey its interests also by national representatives and in strictly intergovernmental institutions. In conclusion, it can be said that Leonardo added the Brussels lobbying venue to the Rome one, thereby increasing its presence in supranational institutions while maintaining a firm grasp on the domestic one.

On the contrary, Airbus is less embedded in national dynamics and presents, due to its trans-European nature, a more pronounced Europeanisation in its lobbying behaviours. Its lobbying expenditure is significantly higher than Leonardo's, and its meetings with both the Commission and the Parliament are more frequent. Although there is no apparent increase in lobbying expenditure throughout the period under analysis, its presence in the GoP and its role in shaping key legislation (Corporate Observatory, 2017) demonstrate its influence in the European arena. Moreover, Airbus also exerted its influence through its adherence to the Kangaroo Group, which shaped and influenced various stages of the policy-making process (Calcara, 2020). However, despite being an extremely active European player, it is worth noting that Airbus is also highly active in lobbying the national governments of the countries where it is more established: France, Germany, Spain, and the UK. Airbus, the largest European company in the sector, represents a perfect example of the Europeanisation process: it possesses the necessary resources, a robust network (Ruiz et al., 2016; Calcara, 2020), both at the supranational and intergovernmental levels, and the organisational capabilities to do so. Moreover, being present in different countries and maintaining strong ties with various

governments, it can also coordinate its efforts in various domestic arenas and bring its instances to more tables. The analysis of Airbus depicts an extremely Europeanised actor, with the ability and reach to supply each institution with the most suitable access goods. Similar to Leonardo, Airbus combines national lobbying in various arenas with European lobbying, addressing the policy initiatives at all stages of policy formulation.

ASD is not a firm itself, and hence did not have to widen its scope or Europeanise. It is a European organisation that aggregates the interests of almost all the industries in the sector. Consequently, it can be considered more as an indicator of the Europeanisation of the industry. It is central in the industrial network (Ruiz et al., 2016), occupying the highest degree of centrality, and represents a diverse range of interests. Its registered lobbying expenditure increased after 2016, in accordance with the general trend demonstrated by the research, and it significantly outnumbered every other actor in terms of accredited people to the European Parliament's premises. The large number of staff, their roles in the GoP, and access to constant and vast information offer a variety of options for accessing goods, which helps interact with all institutions and, hence, be influential at all stages of policy formulation. As shown by the empirical analysis, ASD relies on strong technical knowledge, a vast network and the ability to provide constant insights on the state of the industry, mediating different interests and resulting in high influence and access (Muravska, 2014; Calvo Rufanges, 2016).

The research question was: *To what extent has the defence industry adapted its lobbying behaviours to the EU's growing defence role in defence-related policy and funding since 2016?*

The findings indicate that this adaptation has been significant, yet uneven.

Since 2016, the EU has strengthened its role as a venue for defence-related funding and policy initiatives, gaining competencies in what was previously a strictly intergovernmental and domestic policy area. In response, leading companies and associations have broadened their

presence, increasing their budgets and staff. According to the theoretical pillars, the thesis hypothesised a structural and organisational behaviour of resource-rich actors, while acknowledging possible distinctions dictated by national embedness and access to specific types of resources. Through empirical analysis, the thesis addresses the research questions, demonstrating how the process of Europeanisation was present in the cases presented, albeit to varying degrees. The structural differences and the embeddedness in the domestic scenario played a crucial role: Leonardo juxtaposed the EU forum with its national one, mirroring and transposing its domestic influence in its European affairs. Airbus, being a trans-European company in its nature, increased its spending in Brussels, while maintaining a strong national presence in the Member States where it is more actively involved. ASD, on the other hand, is an umbrella organisation representing European interests, encompassing nearly the entirety of European industries. Hence, it serves as a channel to convey particular interests in a broader arena, possessing the necessary network, staff, and technical expertise to represent European interests cohesively.

Through a methodological framework well established in the literature and particularly suited for small-N and case-specific studies, the thesis utilised empirical data to determine the extent to which three leading actors adapted to the increasing role of the EU. By analysing the data from the Transparency Register, groups' affiliations to broader organisations, their national presence, and triangulating those data with independent reports from media and NGOs, the thesis managed to trace the variation in European presence over the last decade. However, the scope of the thesis is restrained by some limitations regarding the nature of the chosen data. Relying primarily on the Transparency Register and derived data, as well as independent reports, the thesis acknowledges some discrepancies due to incorrect registrations by the actors and the limited availability of sources. Moreover, they cannot extensively capture the informal or unreported lobbying efforts. Nonetheless, the thesis has demonstrated a trend, showing how

these actors increased their presence in Brussels, choosing to lobby at various venues and proving influential at different stages of the EU policy-making process.

In conclusion, this thesis has demonstrated that the European defence industry - or, at least, the three examples chosen - has indeed adapted to the EU's growing role, albeit in different ways, with several distinctions dictated by the organisational and structural features. The three cases demonstrate how firms and associations deploy hybrid strategies, balancing and coordinating national efforts with European ones to maximise their access and influence.

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