



NEXT GENERATION SECURITY

A study on how young Europeans
perceive the defense sector

CONTRIBUTORS TO THIS REPORT

MICHELE TESTONI, Professor of International Relations at IE University and Secretary of the Transatlantic Studies Association.

JUAN JOSÉ DE ARRIBA, F-18 Pilot at Spanish Air Forces and Adjunct Professor of Conflict Resolution at IE University.

QUYNH DINH, Law and International Relations Student at IE University.

METROSCOPIA, a benchmark institute in sociopolitical polls and electoral estimates in Spain.

MEMBERS OF THE NEXT GENERATION SECURITY ADVISORY BOARD

JOHANNES MÜLLER, Head of Sustainability and Communications at Airbus Defence and Space.

JOSE ANTONIO COLL, Head of Sustainability at Airbus Defence and Space.

SORIN DUCARU, Ambassador of Romania, former NATO Assistant Secretary General and Head of the NATO Emerging Security Challenges Division.

DANIEL FIOTT, Non-Resident Fellow at the Elcano Royal Institute and Assistant Professor at the Centre for Security, Diplomacy and Strategy, Vrije Universiteit Brussel.

ANTONIO NOTARIO, Head of Strategic Planning at the Spanish National Security Department of the Prime Minister's Office.

IMMA PUIG, Policy and Strategy Expert, General Director at IPSLINK Group.

MIREIA MERCADER, Sustainability Stakeholders Manager at Airbus Defence and Space.

JEAN MARC RICKLI, Head of Global and Emerging Risks and the Founder and Director of the Polymath Initiative at the Geneva Centre for Security Policy (GCSP).

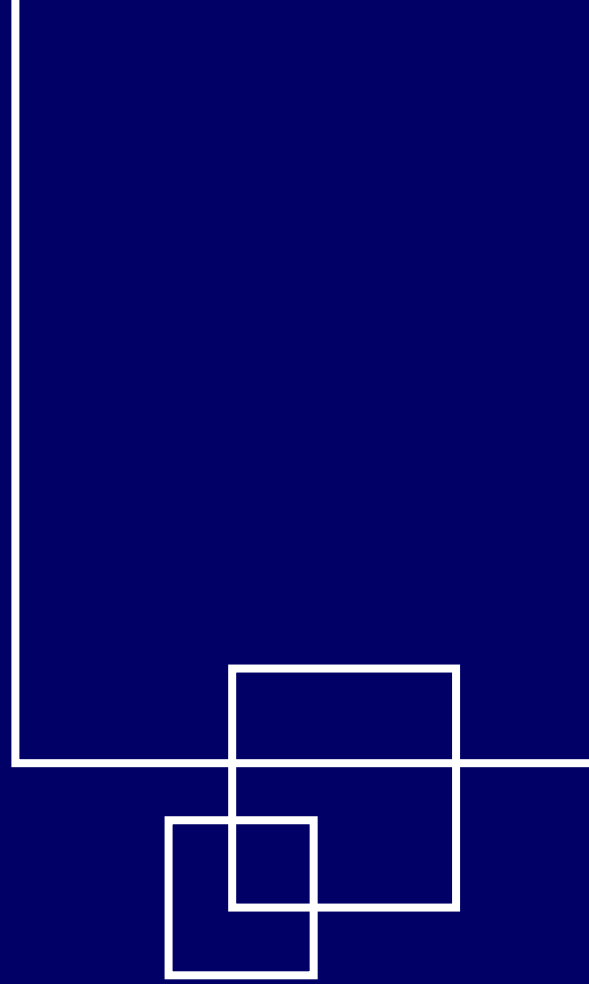


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WRITTEN BY:
MICHELE TESTONI
JUAN JOSÉ DE ARRIBA
QUYNH DINH

INTRODUCTION

The times we live in are characterized by a number of contradictory, and often disruptive, phenomena. On the one hand, the rise of revisionist and authoritarian great powers is renewing the concept and the practice of a ‘Great game’ in international relations. The full-scale invasion of Ukraine, launched by Russia in February 2022, is the major catalyst of this revival of ‘traditional security threats’ to States’ national security. A process of worldwide growth of military expenditures (SIPRI, 2023) as well as an acceleration in technological innovation are generating a sense of uncertainty and insecurity. On the other hand, today’s defense and security policies are also shaped by a number of exogenous factors such as, for instance, climate change, States fragility, social polarization, diseases and pandemics, demographic pressure, migration flows, organized crime, etc.

This vast and composite range of ‘non-traditional security threats’ requires governments to adopt a cooperative and multilateral, rather than conflictual and unilateral, attitude. It means progressing from the logic of ‘private goods’ to the one of ‘public goods’, the defense and security sector included. And this is even more pressing for a community of countries as it is Europe, whose defense framework is still grounded on the long-structured effects of the Cold War era: an ‘externalization’ of its security to the United States and NATO and, as a result, generalized low military spending.

However, in a world characterized by a rising multipolarity dominated by two political and economic giants (the US and China) and populated by multiple great powers (e.g. Brazil, India, Japan, Russia, Saudi Arabia, South Africa, etc.), Europe needs to attain a defense sovereignty if it wants to acquire strategic relevance. European countries, therefore, are asked to reverse this situation of languishing defense spending and inadequate capabilities and develop a new approach to security. In order to make this strategic transition happen, it is essential that, among other things, the defense sector obtains a consistent and comprehensive understanding of public perceptions of security and defense.

The relationship between public opinion and defense-related issues is a long-established area of investigation, which is constantly scrutinized by scholars and polling organizations. The core of this debate is the so-called ‘butter and guns’ dilemma, also known as the ‘welfare and warfare’ dilemma, which was created and developed in economics and public policy studies to highlight the cumbersome tradeoff that exists between a country’s investment in civilian and military goods. It illustrates the idea of ‘opportunity costs’ in a zero-sum context: as governments’ resources are usually limited and cannot be expanded indefinitely, and therefore resources allocated to one sector cannot be used in another, a compromise (sometimes a difficult one) has to be struck between the two. The essence of this dilemma, whose political and electoral repercussions are more than obvious, has been brilliantly captured and explored by scholars like, for instance, Samuelson (1948), Eichenberg (1989), Lamborn (1991), Mintz (1992), Hartley and Sandler (2001), or Hartley (2011).

Nonetheless, a substantial lack of knowledge exists when it comes to the perceptions and preferences of the younger citizens. As a matter of fact, the youth of society will be the foundation on which dynamism and innovation are developed in the defense sector. The youth will also guarantee the future legitimacy and sustainability of this new role of the defense sector.

The purpose of this publication is to present and discuss the findings of a study conducted by the Center for the Governance of Change (CGC) and Airbus in collaboration with the market research

firm *Metroscopia*. As detailed in the following pages, an opinion survey with 58 questions was administered to individuals aged 18 to 35 across four Western European nations: France, Germany, Spain, and the United Kingdom (UK). Following the survey, specific focus groups were organized in each country. In sum, this report aims to start shedding light on the relationship between young citizens and defense and, therefore, reducing this lack of awareness.

THE RESEARCH SHOWS THREE GENERAL FINDINGS:



Respondents, regardless of their country of origin, demonstrate a superficial knowledge of the defense sector, its most relevant actors, and its main areas of practical application. This denotes the existence of a somehow shared, yet broad and vague, view on security and defense, in particular a similar sense of threat perception.



In the focus groups, in which participants were asked to elaborate their ideas more thoroughly, all answers appear to be more nuanced than in the questionnaire: this does not only reflect a general trend to respond more positively in surveys, but is also consistent with the aforementioned lack of awareness of defense-related issues.



A correlation appears to exist between the type of priority that young adults give to the defense sector and their political positioning (in general respondents who display higher levels of patriotism and national identity are more aware of, and sympathetic to, the defense sector). Nonetheless, this correspondence can often be altered by other intervening variables such as, for example, a more direct knowledge of ongoing political events, a national strategic culture that develops from a sense of great power status, or geographical proximity to an existential threat. On the other hand, participants from all countries seem to ignore the role of the defense sector to prevent crises, protect lives, our values and vital infrastructures, and restore damaged ecosystems and post-conflict areas.

THE YOUTH AND DEFENSE: EXISTING GAPS

Understanding young people's perceptions of defense-related issues is crucial for ensuring the sector's overall relevance, reinforcing its effectiveness, and guaranteeing its persistence.

The dynamic and innovative perspectives of young people have to be considered a fundamental added value for the whole of the defense sector due to their capacity to stir and drive innovation, which is a decisive factor in the ongoing global power competition and, thus, a key component for the defense sector of the 21st century.

Yet, there is currently limited knowledge on youth perception of security and defense. The existing literature predominantly focuses on the general public's preferences, often failing to disaggregate data by age and, thus, paying comparatively little attention to the perspectives of young adults. In addition, current literature is largely focused on the case of the United States, which makes any attempt to generate a comparison with other countries—Europe in our case—hard and inaccurate.

In **Europe**, the Eurobarometer (the public opinion service led by the European Commission) has been the primary opinion poll capturing public views on security and defense since the 1970s". Eurobarometer's surveys cover a wide range of topics, including public threat perception, the perceived roles of the armed forces, public confidence in the military, and support for increased defense spending. Annual cross-country polling indicates that events such as the 9/11 attacks in 2001 and the war in Ukraine in 2022 tend to result in more favorable views towards the sector. However, the lack of disaggregated data by age prevents an understanding of whether this trend holds true for the youth.

At the national level, there is very little in-depth or nationally representative data available on public opinion concerning the defense sector. While there are several articles and polls about public opinion on defense spending and a common security and defense policy in the EU (Höse and Oppermann, 2007; Eichenberg and Stoll, 2017; Mader, Olmastroni, Isernia, 2020; Thomson et al., 2023), these are insufficient to paint a comprehensive picture of public opinion on the entire defense industry.

In **Italy** a recently published survey presents what should be, in the aftermath of the last European Parliamentary elections, the main priorities for the EU in the next five years (ISPI, 2024): not only the proposal to 'invest in a common European defense' gets a very low place (ranking only as the fifth priority out of seven with an approval rate of 15%) but, in a very similar fashion, the data are not disaggregated by age.

Britain is one of the few countries with consistent data on public opinion regarding defense and security, gathered through polls conducted by market research companies such as *YouGov* and *Ipsos Mori*. Recent surveys (YouGov, 2023) have shown a clear generational gap in perceptions of the armed forces, with older individuals generally holding more favorable views compared to younger people. This divide also extends to opinions on increasing the size of the armed forces, where older generations tend to support expansion more than younger generations.

Despite more extensive and consistent information on public opinion regarding defense and security issues compared to other European countries, the UK faces the same problem with the EU: there is a significant lack of age-disaggregated data that focuses specifically on youth perspectives, leaving a gap in understanding the unique concerns and aspirations of the younger demographic.

METHODOLOGY

To measure youth opinions and perceptions on security and defense, the Center for the Governance of Change collaborated with the market research firm *Metroscopia*. They conducted surveys and focus groups among individuals aged 18 to 35 in France, Germany, Spain, and the UK.

Initially, an online exploratory focus group comprising six young people was conducted to identify key themes and questions for the survey. The project advisory board members were also consulted to ensure all important questions were included and properly formulated. The final survey consisted of 58 questions, including 12 control questions covering demographics and factors influencing perceptions, such as national pride, news consumption, and experiences living abroad. The questions varied in type, including Likert scale questions, yes/no questions, and some open-ended questions.

Once finalized and translated into the native languages of the target countries, the survey was deployed through 3,600 online interviews, with 900 interviews conducted in each country. Fieldwork took place between May 17 and May 23, 2024. Quotas were applied for region, age, and gender. The margin of error for the total sample,

with a 95.5% confidence level (the most commonly used) and based on the principles of simple random sampling, in the worst case of maximum uncertainty ($p=q=50\%$), after appropriate adjustments for gender, age, and place of residence, is ± 3.3 points for global data.

To better understand the survey results, provide nuances, and address contradictions, four focus groups were conducted via Zoom in France, Germany, Spain, and the UK. Each group included six to eight participants aged 18 to 35, with an even split between men and women. These sessions lasted between 60 and 90 minutes, ensuring ideological diversity among participants.

This report analyzes and integrates findings from both surveys and focus groups, supplemented by secondary literature and the researchers' background knowledge. The questions, figures, and focus group excerpts presented here are selectively chosen based on their relevance to the report's objectives. Although all questions were cross-analyzed by control factors such as gender and education, these factors generally did not significantly impact the responses, and thus, they are not highlighted in this report. The raw survey data and focus group transcripts are available upon request.



SURVEY SAMPLE

Table 1:

Gender of respondents

	France	Germany	Spain	UK	Total
Male	438	440	441	441	1760
Female	469	460	459	459	1847

Table 2:

Age of respondents

	France	Germany	Spain	UK	Total
18-24	384	343	331	342	1400
25-35	523	557	569	558	2207

Table 3:

Highest level of education achieved

	France	Germany	Spain	UK	Total
Non qualification	47	48	13	15	123
Less than high school	111	114	61	50	336
High school	390	445	416	404	1655
Bachelor's or graduate's degree	359	293	410	431	1493

Table 4:

Current occupation

	France	Germany	Spain	UK	Total
Employed	535	554	592	640	2321
Unemployed	100	120	85	90	395
Student	208	146	169	113	636
Homemaker/ Caregiver	24	24	19	27	94
Other	24	28	21	14	86



SURVEY SAMPLE

Table 5:

Residence

	France	Germany	Spain	UK	Total
Small Town	124	117	99	195	535
Large Town	145	143	169	272	729
Small City	257	264	205	137	863
Med. City	202	176	216	124	718
Large City	179	200	211	172	762

Table 6:

Level of national pride

	France	Germany	Spain	UK	Total
0 (none)	15	41	28	56	140
1	15	28	10	15	68
2	28	43	31	28	130
3	47	53	43	60	203
4	59	65	43	69	236
5	118	145	95	99	457
6	108	95	98	100	401
7	124	108	144	135	511
8	133	110	118	106	467
9	65	49	80	56	250
10 (Very proud)	156	122	178	137	593

A young man with dark hair is shown in profile, looking down at a laptop screen. He has his hand resting on his chin in a thoughtful pose. The entire image is overlaid with a semi-transparent blue filter. In the bottom-left corner, there is a white-outlined rectangular box containing white text.

HOW DO YOUNG
EUROPEANS VIEW
**THEIR SECURITY
ENVIRONMENT?**

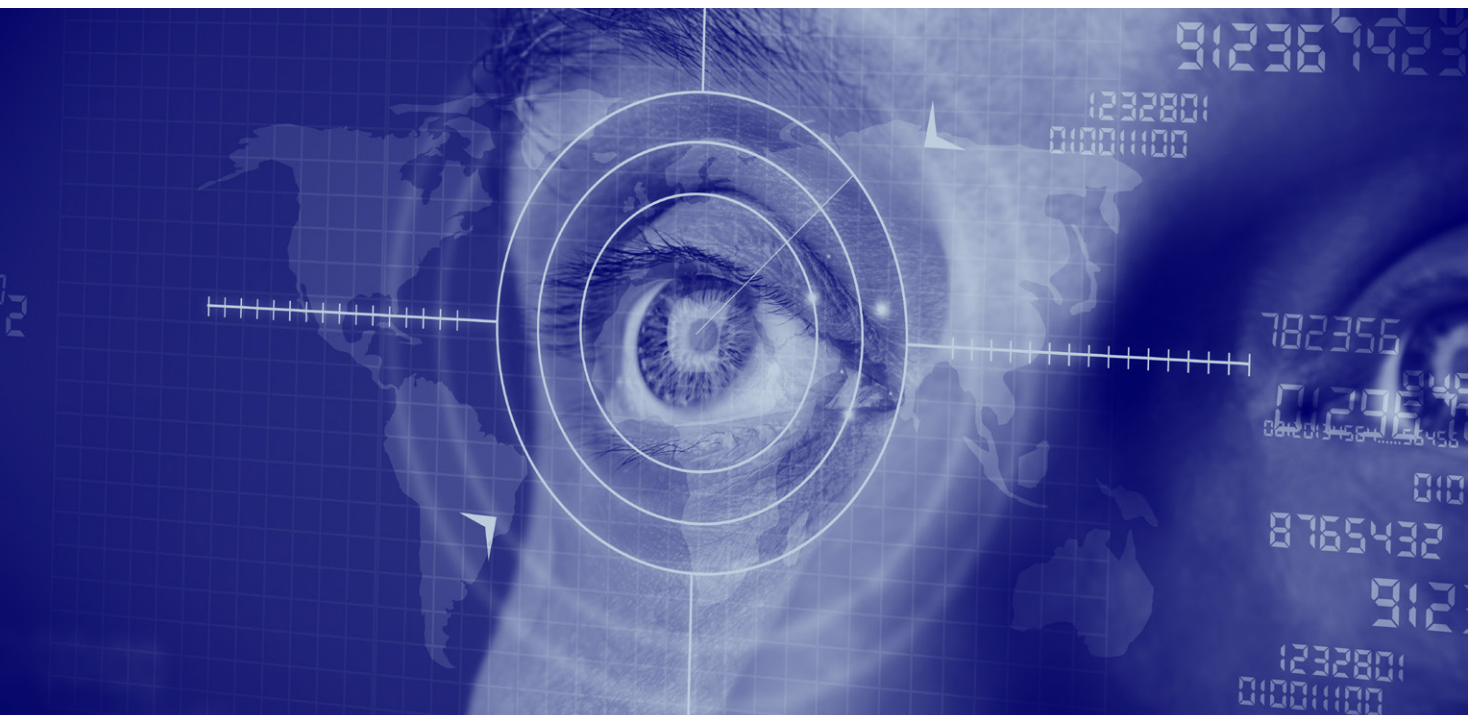
HOW DO YOUNG EUROPEANS VIEW THEIR SECURITY ENVIRONMENT?

This section analyzes the results that have emerged from the opinion survey and related focused groups. The findings are broken down into the four main issue-areas in which the questionnaire was structured:

- i. Threats and international security**
- ii. National security and defense**
- iii. Views on the defense sector**
- iv. Companies in the defense sector**

The first two sub-sessions adopt a ‘macro-oriented’ perspective as they focus on a broad set of topics related to, respectively, the evolving features of today’s global security and the way in which States are adapting their defense and security policies to face those trends. The other two sub-sessions, instead, take a ‘micro-oriented’ point of view as they deal, on a more direct and straightforward way, with the vast number of actors and other stakeholders involved in the defense sector—defense companies included.

What is perhaps the most defining feature of these four sub-sections is the relatively common type of results displayed by participants, regardless of their country of origin. A possible answer is a sense of threat perception that is shared across Western Europe. Yet, this fact deserves a more sophisticated explanation: on the one hand, if one compares different answers given in the questionnaire, some results turn ambiguous or incongruous; on the other hand, some of the data that emerge from focus groups look self-contradictory. Concrete examples will be provided in the following pages. Therefore, it seems fair to say that, despite the existence of commonly shared preferences, interviewed people reveal also a lack of coherent awareness and knowledge with relation to the defense and security sector. This leads one to argue that such preferences are also, if not largely, determined by a broad array of intervening variables grounded on cultural, ideological, or psychological bases which shall not be disregarded.



1

THREATS AND INTERNATIONAL SECURITY

1. CURRENT THREATS

The first layer of this report begins with an **assessment of the threats, risks and other undergoing disruptive phenomena that shape today's international security relations**. Two 'traditional security threats' are presented: Russia and China. Respondents appear to reflect a consolidated pattern, especially since the start of the war in Ukraine: Russia is clearly perceived as an existential menace (with Spain being somewhat a partial exception), whereas the image of China appears more ambivalent and less threatening. In the case of 'non-traditional security threats', top priority has been given

to, respectively, terrorism, cyberattacks, and natural disasters caused by climate change, with the Israel-Hamas war, irregular immigration, and the upcoming US elections scoring a lower percentage [Question 1].

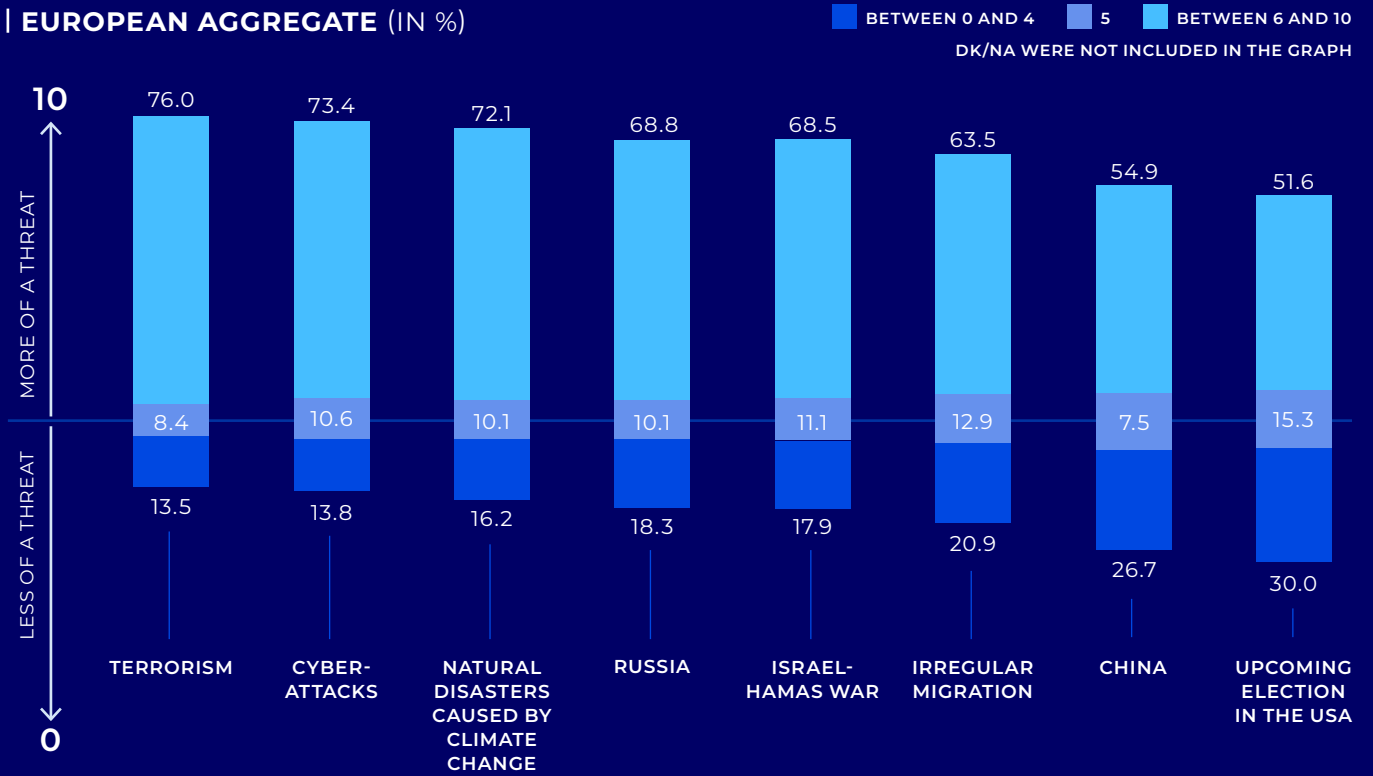
This is confirmed in the focus groups, in which there is a clear understanding that Russia is Europe's main threat, considering that its invasion of Ukraine could end up dragging their respective countries into a generalized conflict.



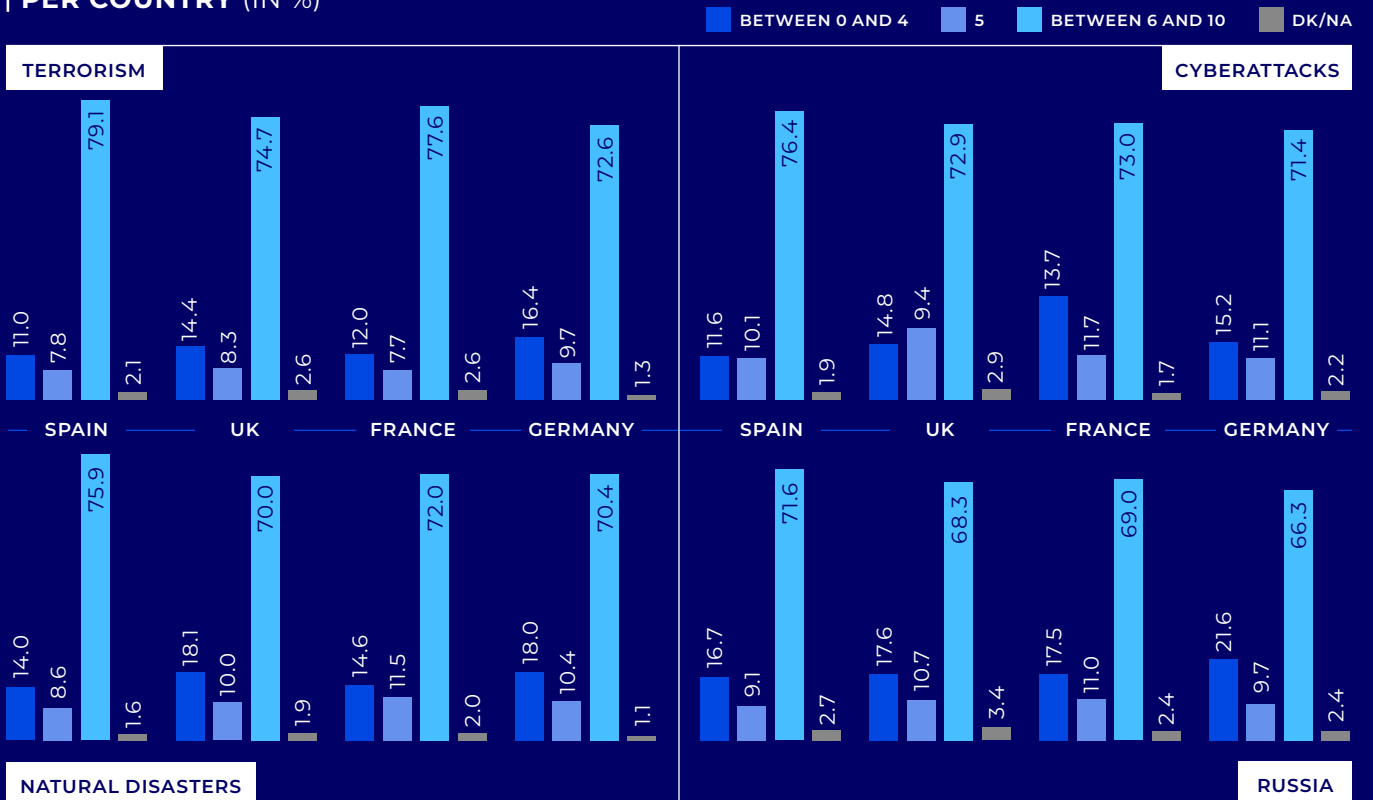
Q1

Of the following possible risks or threats to European security, to what extent would you say that each of them is a real threat at the moment? Give your answer on a scale from 0 to 10, where 0 means 'does not pose a threat' and 10 means 'poses a very serious threat'.

EUROPEAN AGGREGATE (IN %)



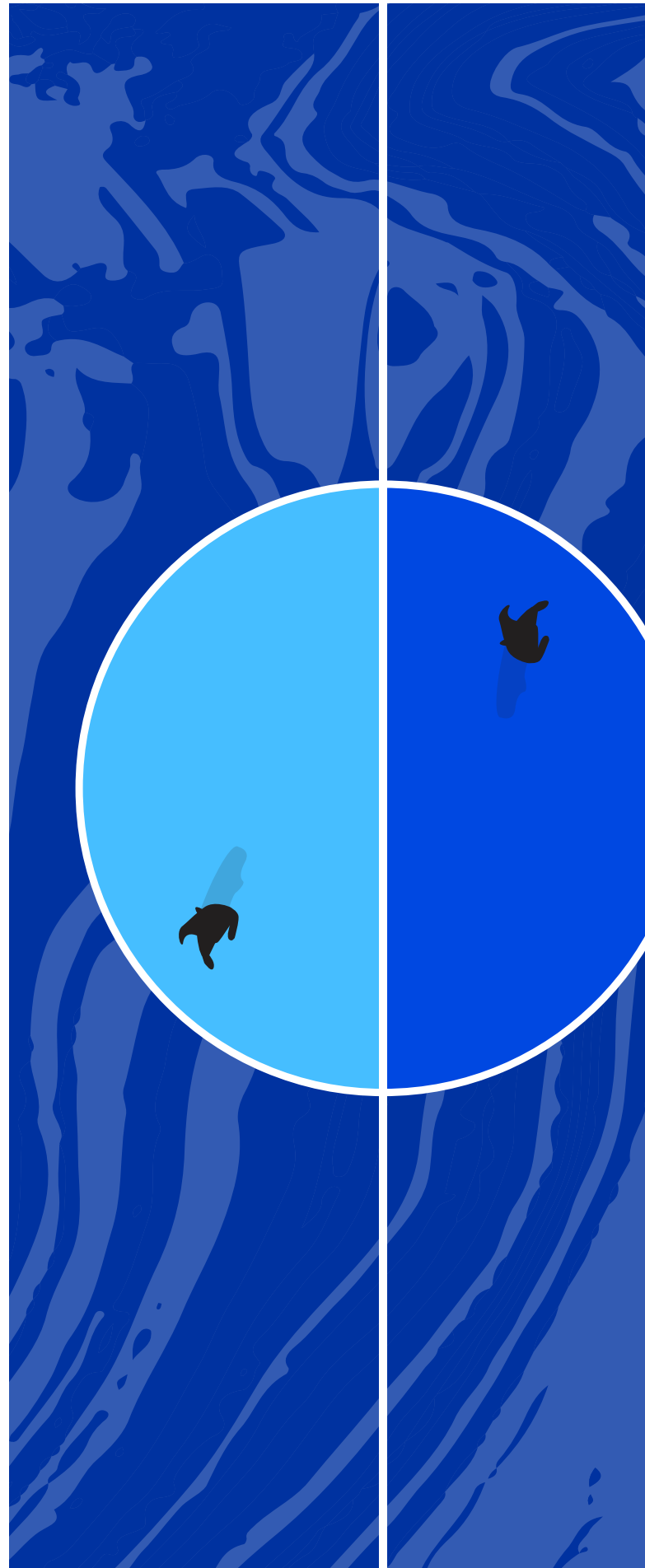
PER COUNTRY (IN %)



These results confirm a double tendency.

Firstly, as previously mentioned, the need to disaggregate surveys' data by age is greatly needed in order to have a less superficial knowledge of societal priorities. This is particularly evident in the case of irregular immigration, a topic of immense political and electoral relevance these days: while still seen as an international security threat by 63.5% of participants, this issue does not seem to rank as high among youth as among other age groups (Schotte and Winkler, 2018). By the same token, the low threat perception assigned to the conflict in Palestine, especially if compared to the issue of terrorism, indicates that young people perceive this issue largely as an ethical or moral concern, with no or minimal security spillovers. Recent student protests are a sign of the lack of a 'securitization' process and, more broadly, the rejection of the simple use of force (at least in the way in which Israel does) as a major foreign policy instrument. Equally important, the possible re-election of Donald Trump as US President, and the fallout of this result for European security, does not seem to represent an existential threat to respondents.

Secondly, these data corroborate a natural, yet shortsighted phenomenon: people become concerned primarily by what we see at a first glance and avoid going deeper into the reality of facts. Citizens are turning into 'lazy information consumers': this indolence magnifies our inborn information biases, a condition that is amplified by the 'echo chamber effect' of social media. This incongruity is revealed, for instance, by the asymmetric results given to China and cyberattacks: while the Asian superpower is the 'main enabler' of Russia's military invasion of Ukraine, people find it difficult to grasp the threat it poses to other types of threat. This denotes that individuals have usually hard time in assessing events which have not yet caused any dramatic impact on the general public, or are still perceived as too distant, vague, and complicated.



2. THE ROLE OF EUROPE

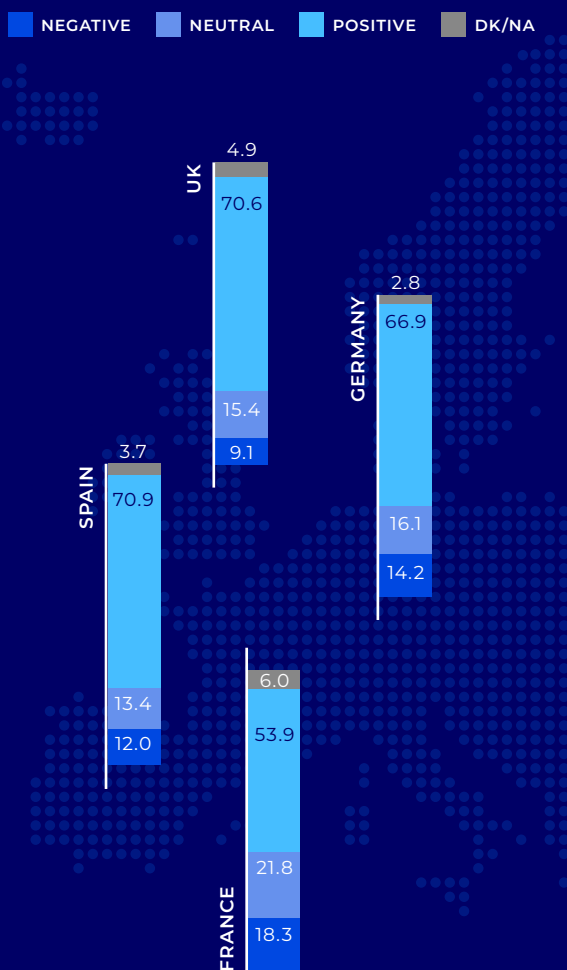
The second factor of this initial sub-session **presents remarkable contradictions**. When asked about assessing NATO membership and Europe’s military dependence on the US, respondents display a substantial level of satisfaction with their country’s participation in the Atlantic Alliance [Question 2].

Despite some distinctions, in particular the persistence in France of an old sentiment of skepticism towards the Anglo-Saxon world, the foundations of NATO remain solid. As shown by the graph below, there is a strong correlation between the appreciation of NATO membership and one’s level of national pride.

Q2

To what extent do you think that [Country’s] membership of NATO is a positive or negative thing for the country? Give your answer on a scale of 0 to 10, where 0 is ‘very negative’ and 10 is ‘very positive’. [Answers from 0 to 4 were grouped as negative, 5 to 6 as neutral, and 7 to 10 as positive]

| PER COUNTRY (IN %)



| PER LEVEL OF NATIONAL PRIDE (IN %)



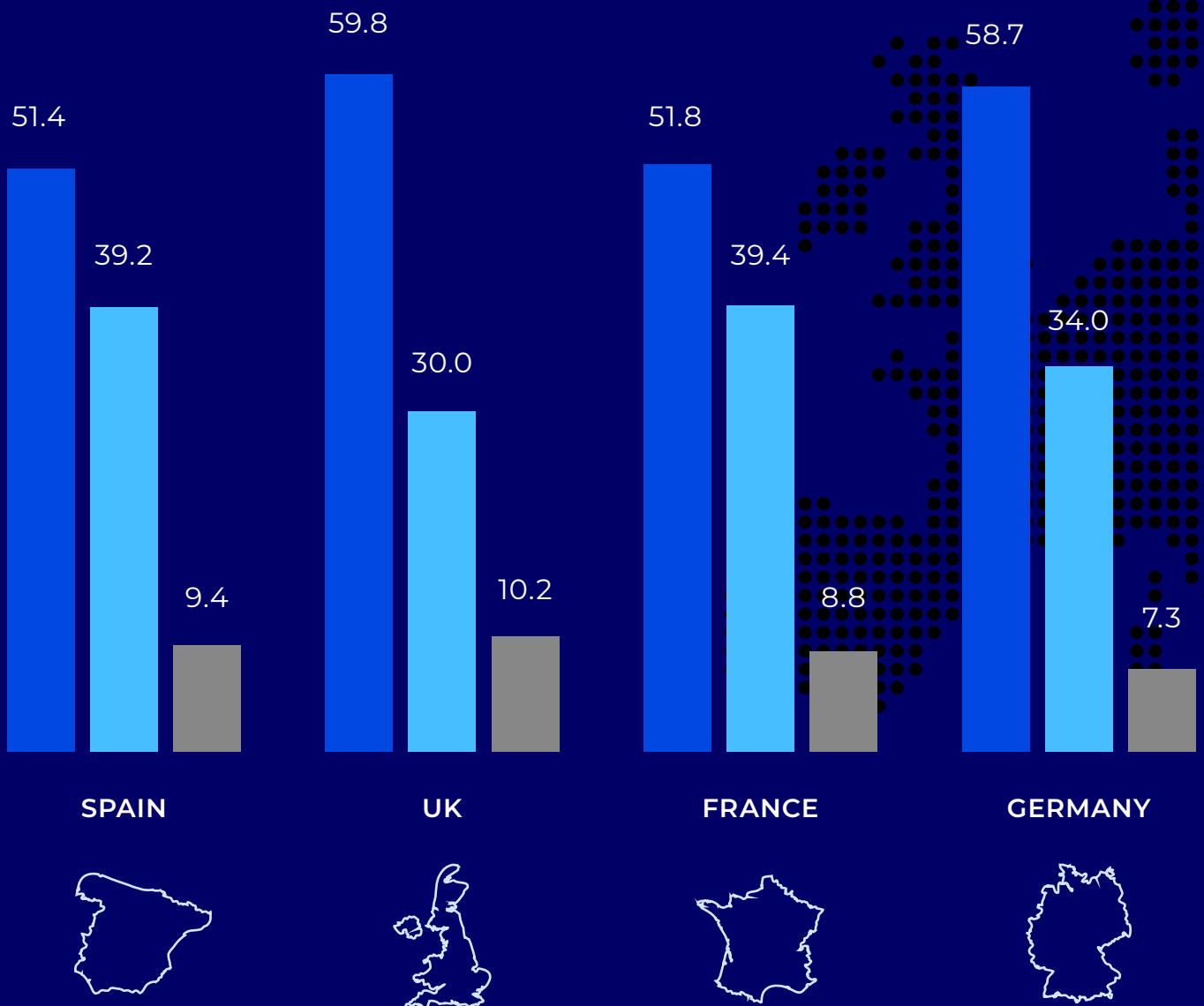
However, in a very surprising way, the majority of respondents in each of the four considered nations argues that Europe is capable to protect itself without US support [Question 3].

Q3

Overall, do you think that Europe can adequately protect itself from possible external threats without the support of the United States?

PER COUNTRY (IN %)

- YES, IT CAN PROTECT ITSELF ADEQUATELY
- NO, IT CANNOT PROTECT ITSELF ADEQUATELY
- DK/NA



In the focus groups, answers turn more articulated: participants are conscious about the current level of dependence on the US, but at the same time they show a desire for a greater military autonomy of Europe—many believe that most of today’s conflicts are in fact created by the US itself.

| FOCUS GROUP EXCERPTS ON NATO MEMBERSHIP

“I think it’s a really good thing. I think protection in groups is always going to be beneficial. I think it’s [NATO membership] beneficial if you can get a group of countries to come to a similar agreement.”

—FEMALE, 21 YEARS OLD, UK

“I think it’s positive to be part of NATO. If Ukraine had been in NATO, all members would have defended them.”

—MALE, 31 YEARS OLD, SPAIN

“Some might argue that relying on NATO could mean the UK has to depend on other countries, especially the US for its defense. I do worry that this limits our independence in making the decisions. And I think there’s also concerns about being drawn into conflicts that the UK might otherwise avoid, if not for its commitments of NATO.”

—FEMALE, 26 YEARS OLD, UK

“In my opinion this is a bad thing. I think it’s a bad thing for France because all the decisions are made by the United States. So, I think that there is an American influence regarding NATO, which does not allow France and other European countries to be completely independent.”

—MALE, 32 YEARS OLD, FRANCE

“I am not a fan of NATO and I feel the situation is complicated. In Europe, we should look more at our things and make our own decisions without being pressured from the outside.”

—MALE, 32 YEARS OLD, GERMANY

“I think that without NATO, we would be even less protected and less able to cope some conflict or anything because we are not good enough regarding defense and security.”

—FEMALE, 24 YEARS OLD, FRANCE

| FOCUS GROUP EXCERPTS ON ALLIANCE OF EUROPEAN COUNTRIES WITH THE USA

“The U.S. is conflictive but having them as an ally is better than an enemy. It doesn’t bother me; it’s the reality we have. They are an economic power, and we are not.”

—FEMALE, 21 YEARS OLD, SPAIN

“For a short-term conflict with the vast majority of countries in the world, we could defend ourselves without the help of the USA. But for a long-term conflict with Russia and China, in my opinion it is not sustainable.”

—MALE, 23 YEARS OLD, FRANCE

“I think that the United States keeps getting stronger and that we, in France, are getting worse. And I think that the United States is using France and Europe to start some type of “cold war” with Russia, and I think that’s not a good thing for Europe.”

—MALE, 32 YEARS OLD, FRANCE

“I think the UK does have a lot of strong and capable armed forces. But having the USA as an ally give us an extra layer of security because they have significant military resources and capabilities that can definitely be crucial in times of major conflict.”

—FEMALE, 26 YEARS OLD, UK

“The USA appears to be the savior of all but often generates more conflicts than it solves. It protects countries from issues it sometimes creates.”

—FEMALE, 21 YEARS OLD, SPAIN

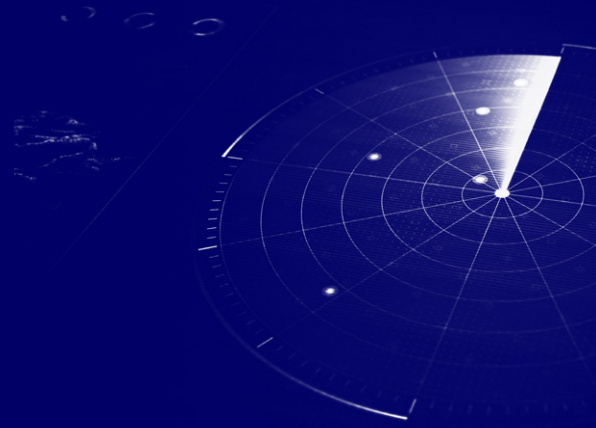
“I think Europe can defend itself without the help of the USA. Or maybe we do not need to protect ourselves or defend ourselves if we do not take part in conflicts in which the USA is involved.”

—MALE, 32 YEARS OLD, GERMANY

The statement about a perceived military self-sufficiency of European countries seems to be contradicted by a variety of facts. **Firstly**, according to the recently released report on NATO members’ defense expenditure, although Canada and the Europeans have started to increase their military spending, the US still accounts for almost two-thirds of NATO’s budget (63.7% of total amount) (NATO, 2024). **Secondly**, while Russia (as seen in Question 1) is considered as the greatest traditional security threat to Europe, only less than half of the respondents—regardless of their nationality—says that it would be in favor of deploying a European military force in a high-intensity violent operation [Question 4]. Last but not least, respondents seem to forget, or ignore, that the US has been so far the largest military donor to Ukraine with over \$100 billion (BBC, 2024).

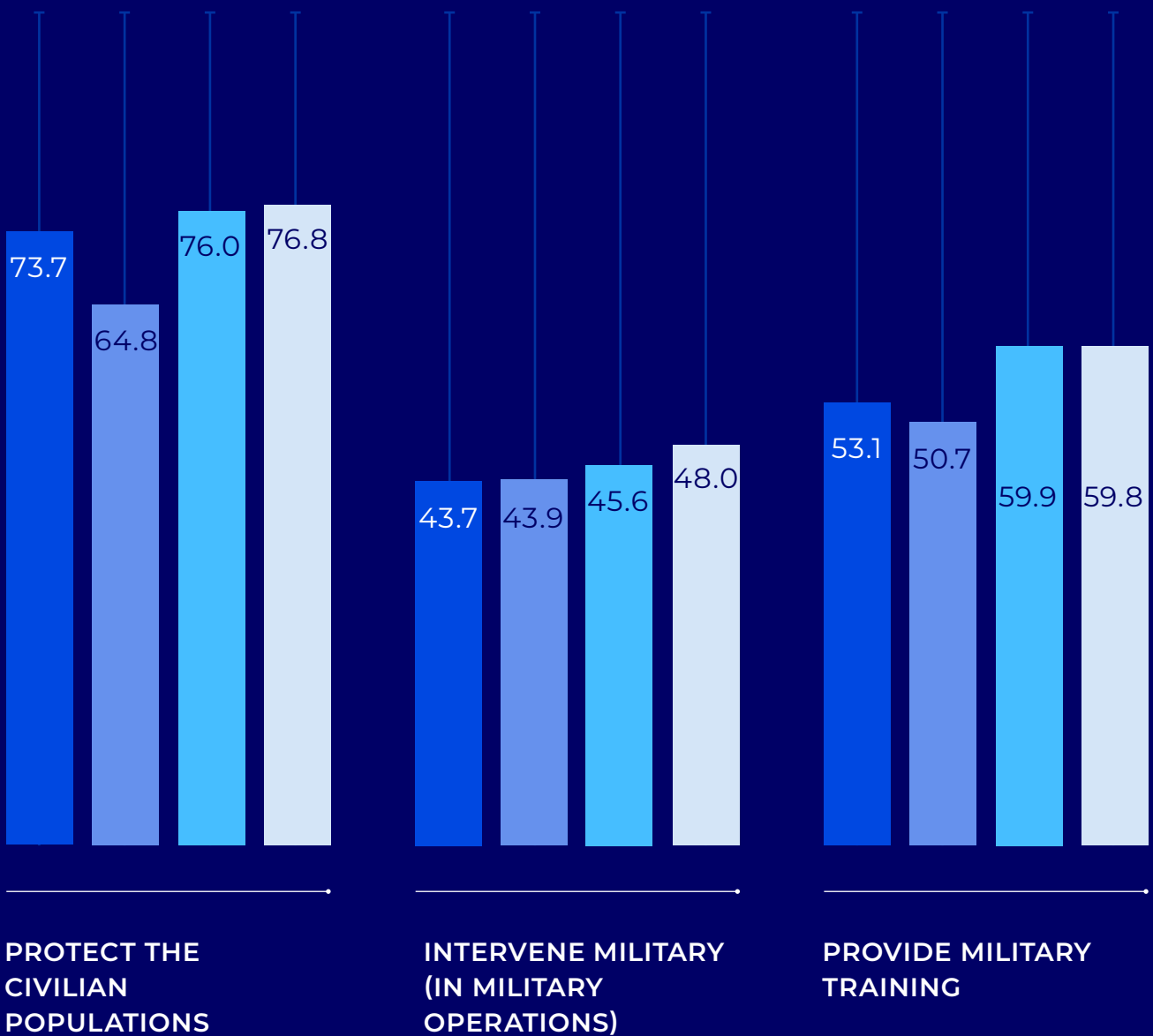
Q4

Would you be in favor of deploying a European military force in high-intensity conflicts to ... ?



| % OF PARTICIPANTS PER COUNTRY IN FAVOR

- GERMANY
- FRANCE
- UK
- SPAIN



**FOCUS GROUPS EXCERPTS ON
COUNTRY'S ABILITY TO DEFEND
ITSELF AGAINST CYBER-ATTACKS.**

"I would say the UK is quite prepared to defend itself against cyber-attacks. But I think like all countries, it still faces ongoing challenges. I feel like the government has made a lot of significant investments in cybersecurity, establishing the National Cybersecurity Centre. But I also think that it's constantly evolving. We need to be able to adapt to these technologies to stay ahead."

—FEMALE, 24 YEARS OLD, UK

"I have friends working in IT, who did internships in Asia and who told me that in fact, there, the teaching of IT was much better than the one in France. So, I think the problem isn't just the equipment, it's also really the capabilities of the engineers."

—MALE, 23 YEARS OLD, FRANCE

"I would say it's our weakest point, the easiest way to attack us today. And it's terrible because that world is advancing rapidly. I think something will happen sooner or later. We need to invest because many countries are far ahead, for example, in Asia."

—FEMALE, 24 YEARS OLD, SPAIN

Nevertheless, this alleged confidence in Europe's traditional warfare capabilities seems to be offset by more realistic considerations about Europe's deficiencies to deal with new forms of warfare, especially 'hybrid warfare' emanating from generative AI technology [Question 5].

Once again, the analysis of focus groups is illuminating: the acknowledgement that Asian nations are 'far ahead' in the AI domain highlights the contradiction we have previously discussed about the relatively low level of threat assigned to China in the questionnaire. Also, and quite interestingly, a slight gender imbalance emerges with men looking more confident in Europe's preparedness than women.

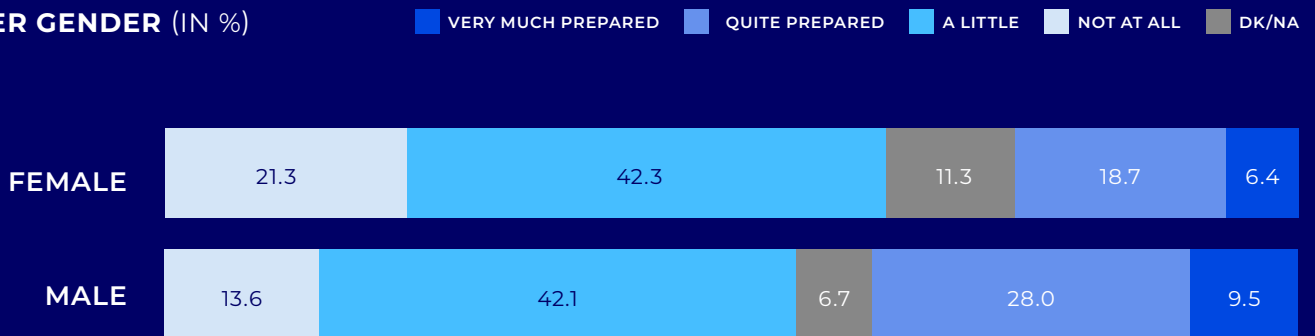
Q5

Many emerging technologies (such as generative AI) are currently enabling new forms of warfare (e.g. hybrid warfare). In your opinion, to what extent would you say that European countries are prepared to deal with these new forms of warfare?

PER COUNTRY (IN %)



PER GENDER (IN %)



2

NATIONAL SECURITY AND DEFENSE

This layer has three objectives: evaluating the national security priorities in each of the four surveyed countries and assessing the likelihood of respective nations to be involved in armed conflicts in the next future while, at the same time, addressing individuals' willingness to volunteer in the defense of one own country or an ally. Similarly to the previous section, this set of questions reveals an array of commonly shared perspectives which can be largely traced back to the generational belonging of the respondents. In other words, **young people show the existence of some common Western European identity.**

However, the differences that emerge seem to be originating from a different motivation: if in the previous part they could be attributed to cognitive mechanisms, in this section they are likely to have cultural and, to some extent, geographical foundations. When talking about such a defining and definitive item as 'national security and defense', it is hard to separate one's perspectives from a country's strategic culture—'the result of a socialization process [through which] a set of general beliefs, attitudes, and behavioral patterns ... has achieved a state of semipermanence' (Snyder, 1977: v). Once again, considering the respondents' level of 'national pride' provides an interesting connection.

1. WHAT ARE YOUNG PEOPLE'S PRIORITIES FOR NATIONAL SECURITY?

National security is, by definition, a 'hard' concept which involves a specific and narrower goal of any country's foreign policy: as the term suggests, it is about the defense and integrity of a State's territory, critical infrastructures, governing institutions, and the physical protection of the population. But it can also include an array of 'soft' goals that belong to the normative sphere

such as, for instance, safeguarding the rule of law and freedom of elections, upholding the nation's values and culture, or fighting environmental degradation.

Analyzing the data provides interesting and illuminating insights [Question 6]. Three out of four countries display the persistence of a traditional attitude towards national security and defense: in France, Germany, and the UK there is a clear preference for 'hard' defense objectives over 'soft' ones—the protection of strategic infrastructures and the country's sovereignty against external threats.

Very noteworthy are the female perceptions: national cases reveal some differences, but overall women score very high in countries' top priorities, which indicates that there is no gender divide in the defense and security field. Women are equally interested in this kind of policies as men.

On the contrary, the results generated by the Spanish group lean towards an opposite direction. Unlike the other three cases, there is an unequivocal preference for 'soft' objectives over 'hard' ones as well as for domestic issues over external ones. Also, this phenomenon shows a fairly equal gender distribution: men and women alike share this set of preferences. Put it differently: Spain's priorities look upside-down with respect to France, Germany, and the UK.

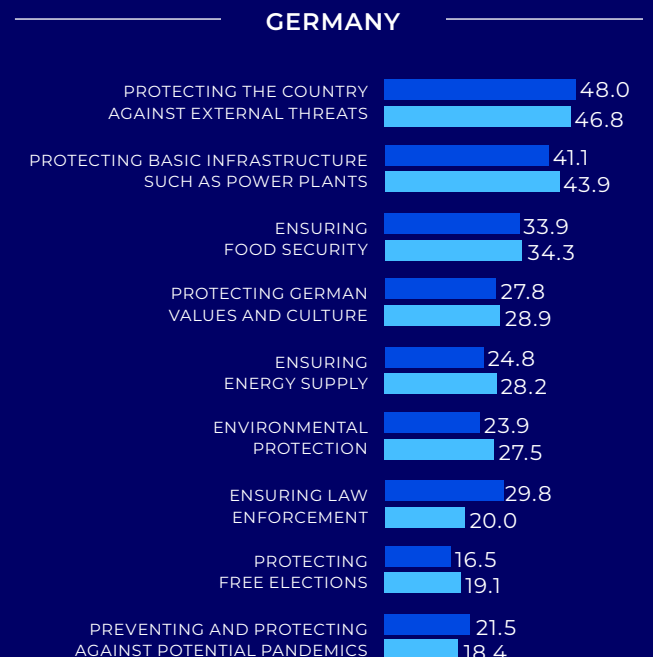
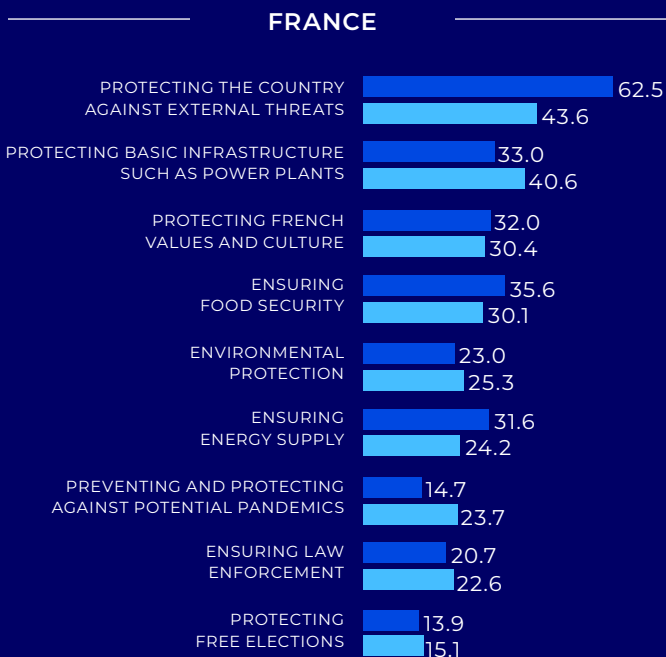
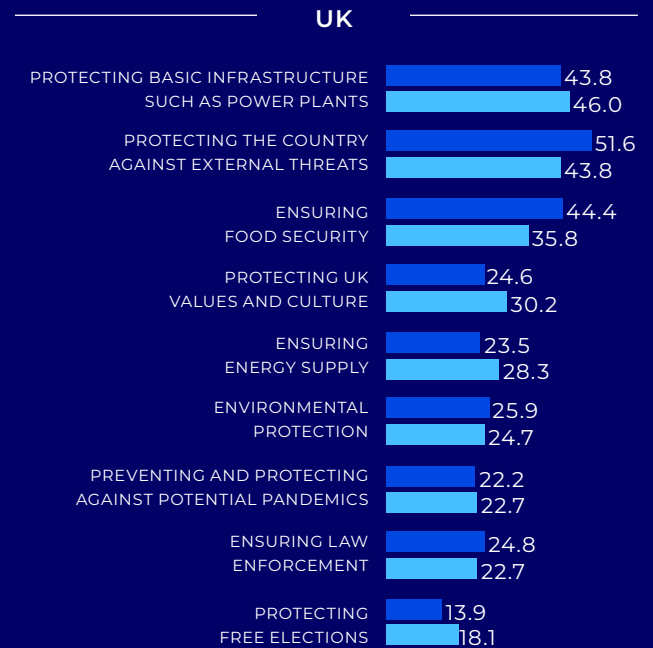
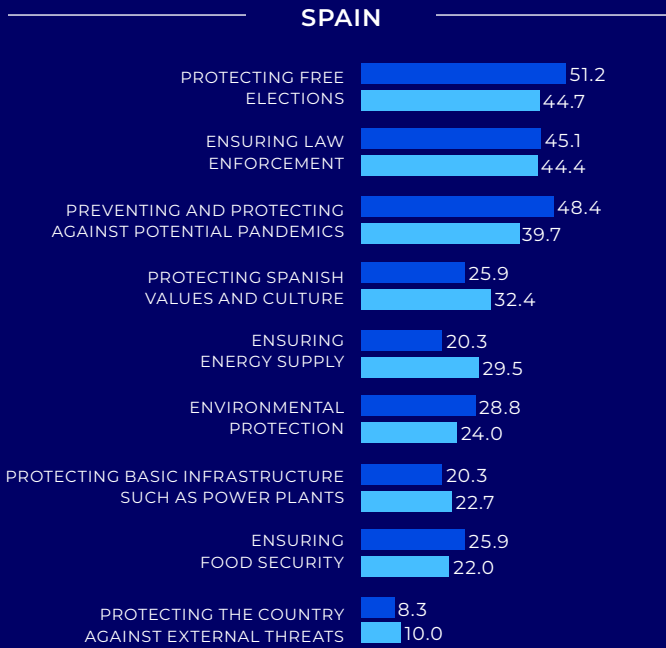
The only item that is shared by our four cases is the protection of national values and culture: in France, Germany, Spain, and the UK this is ranked fourth in the priorities' list, with men always scoring higher than women. The exception is France, where the item is ranked third and women scoring slightly higher than men.

Q6

Of the following objectives, please select the three that you consider most important for the defense and security of [Country] (Multiple answer question).

PER COUNTRY (IN %)

■ FEMALE
■ MALE



Quite interestingly, the dynamics of all focus groups are revealing of the way in which the youth perceive national security: **when explicitly asked about the priorities of the defense sector, participants provided some traditional answers, but then all quickly turned to discuss the fact that there are other more important priorities for the State.**

| FOCUS GROUPS EXCERPTS ON PRIORITIES OF THE DEFENSE SECTOR.

“Deterrence, particularly with what we have in France with the nuclear weapons, the submarines that circulate at sea. It is showing others “that they must not come and bother us.”

—MALE, 33 YEARS OLD, FRANCE

“The priority should be to solve conflicts in a peaceful way. Peaceful resolution should be the priority of the defense sector.”

—MALE, 27 YEARS OLD, GERMANY

“I think it’s not just about military defense but also defending at-risk groups in the population, like battered women.”

—FEMALE, 30 YEARS OLD, SPAIN

“I think that for the UK, defense should focus on keeping the country safe, both from traditional threats, and just new ones like cyber-attacks. I think that means having a strong armed force, investing in the latest technologies.”

—FEMALE, 24 YEARS OLD, UNITED KINGDOM



But why is Spain such a strong deviant case when it comes to prioritizing national defense objectives?

The explanation appears to be grounded on two variables: strategic culture and geographical proximity to clearly recognizable threats. Unlike France and the UK, which were great powers while enjoying a condition of established democracy, and whose strategic culture still retains elements of national pride and ‘exceptionalism’, Spain’s strategic culture is characterized by ideas of pacifism and multilateralism. Not only Spain lost its empire much earlier than Britain and France, but the ideational connotations of a great power status (i.e. strong sense of national unity, high esteem for the armed forces, and propensity to get involved in overseas military operations) are largely considered as a toxic legacy of the negative and authoritarian past of Spain, which stretches from the shocking military defeat in Cuba against the US (1898), the long list of wars in Morocco, and above all Franco’s military coup (1936), the ensuing civil war (1936-1939), and his long dictatorship (1939-1975). Indeed, Spain’s contemporary history suffers of a ‘military problem’ (Cardona, 1990).

As current literature on foreign policy analysis says, Spain and Germany share a similar past of right-wing authoritarianism which has contributed to generate a similar foreign policy culture of multilateralism and anti-militarism. Yet, this is unable to explain why, in our report, Spanish respondents show very different preferences not only with regard to France and the UK, but also Germany.

Geographical proximity seems to provide a solid justification: the Russian invasion of Ukraine unleashed many and deep shockwaves in German politics and society such as, for instance, a harsh criticism towards the old practice of the *Wandel durch Handel* (‘change through trade’, the attempt to engage, and pacify, non-democratic regimes through economic interdependence) or the announcement of a *Zeitenwende* (‘epochal shift’) by Chancellor Olaf Scholz in his famous Bundestag speech (27th February 2022). Spain’s structural dependence on Russia is more limited, and

its geographical location (in South Western Europe) makes the situation in Ukraine an important yet non-existential threat to its national security. On the contrary, Spain’s domestic matters (Catalan independentism, in particular) and the still fresh memory of the positive role of the armed forces during the Covid-19 pandemic have likely played a much more direct role in shaping the preferences of Spanish respondents.

2. INVOLVEMENT IN FUTURE CONFLICTS?

When moving into a pro-active side national defense and security, data display a substantial degree of continuity with the previous sub-section. It appears no contradiction that respondents from the UK and France believe that their country is likely to be involved in future conflicts (57% and 52% respectively), with the Germans following immediately thereafter (49%) and the Spanish lying significantly behind (39%) [Question 7]. It goes without saying that this perception is very much molded by the current situation of European security and takes minimally into account the prospect of a different conflict in other parts of the region.

As it emerges from the focus groups’ discussions, young people reveal a feeling of insecurity, but threats are still perceived as distant, indirect, or financial-based.

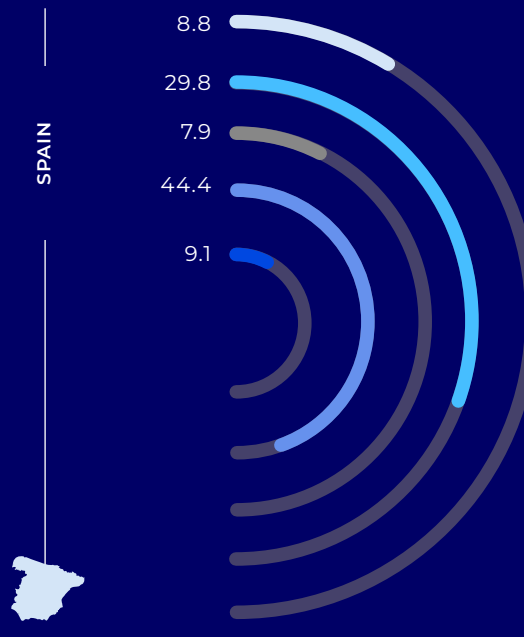
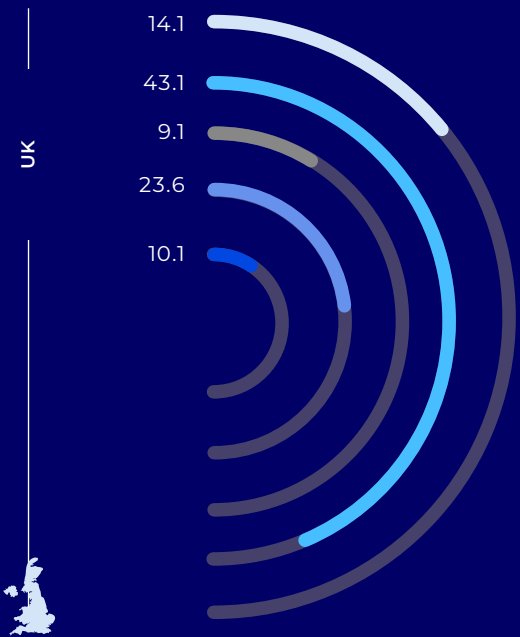
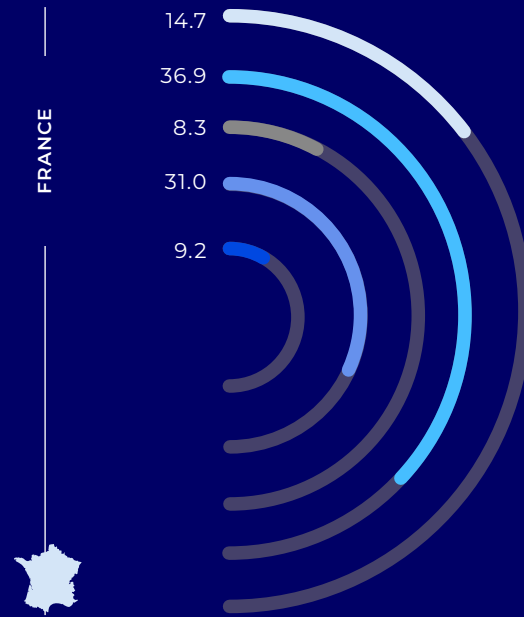
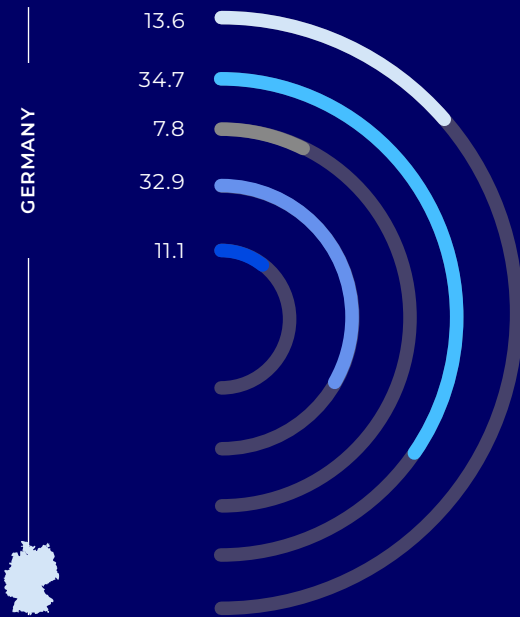
The idea of an interconnectedness between different strategic scenarios and diverse types of threat (traditional and non-traditional) is clearly not taken into consideration. Similarly, as written earlier, the ongoing conflict in Palestine is primarily considered by young Europeans as a humanitarian and moral issue, with a minimal understanding of the risks that a regional escalation could entail for European security.

Q7

In the next 10 years, how likely do you think it is that [Country] will be directly implicated in a conflict involving armed force?

- VERY LIKELY
- QUITE LIKELY
- DK/DA
- UNLIKELY
- NOT LIKELY AT ALL

| PER COUNTRY (IN %)



| FOCUS GROUPS EXCERPTS ON PERCEPTIONS ON THREATS TO NATIONAL SECURITY.

“The conflicts that are going on currently around the world are quite concerning because they could lead to World War III. That is a very scary thought but it’s a possibility.”

—FEMALE, 24 YEARS OLD, UK

“I think anything can happen. There are crazy people everywhere, we don’t know what Russia is capable of doing. So, there are people who have nothing to lose and who are completely lost and we don’t know what could happen.”

—FEMALE, 31 YEARS OLD, FRANCE

“I don’t think France will be affected by armed conflicts. We have the nuclear threat, which is very dissuasive. Regarding the Russo-Ukrainian conflict, I am not choosing sides, there are no good guys, no bad guys in the war, only interests. But it was really a settling of scores between Russia and Ukraine on a particular territory. In my opinion, the probability of the Russian invasion of Europe is non-existent. There will be no conflict in Europe that will concern us.”

—MALE, 23 YEARS OLD, FRANCE

“No, I don’t think that in the next five or ten years we’ll be dragged directly into a war. Whether that’s like in Europe, Russia, Ukraine, or like more international conflicts, I think it’d be more indirect, like on supplies or finance.”

—FEMALE, 24 YEARS OLD, UK

“I do not feel threatened. I feel safe, but I have to say that the events do affect me. For me, the civilians are most essential, and these are the people who suffer the most when a war happens. Civilians have to be protected.”

—MALE, 22 YEARS OLD, GERMANY

“I don’t feel a significant threat, defense isn’t something constantly on my mind, thankfully. There are conflicts and threats, but you always try to live in a bit of a bubble thinking it’s far from you. That’s how I experience it daily, at least.”

—FEMALE, 27 YEARS OLD, SPAIN

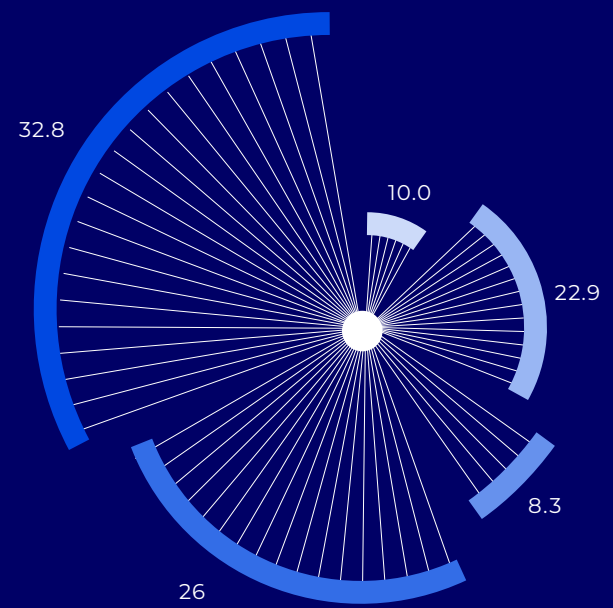
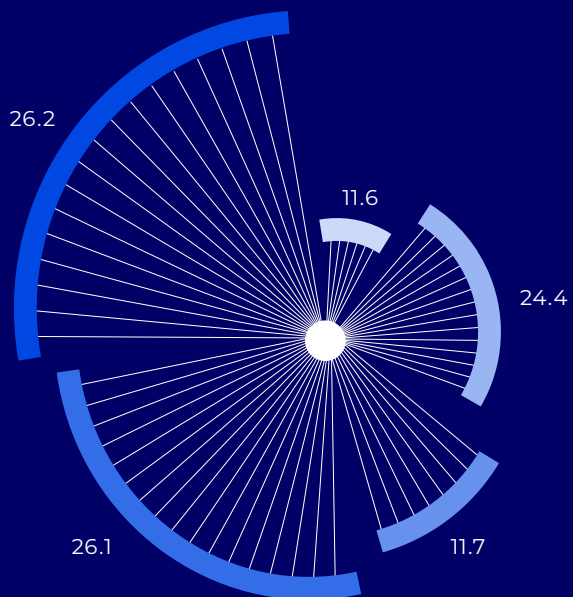
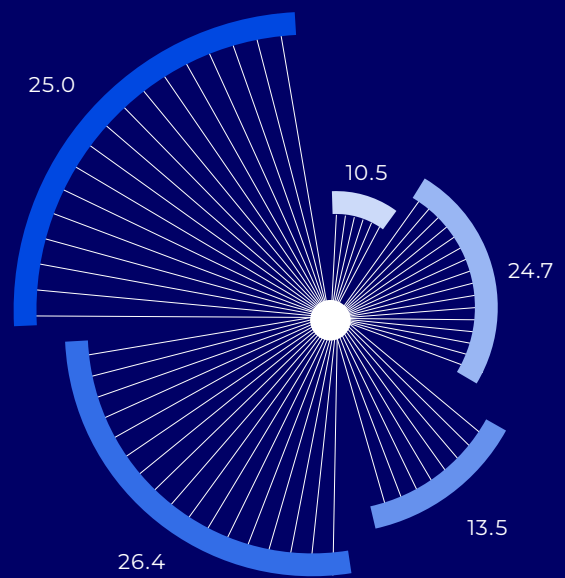
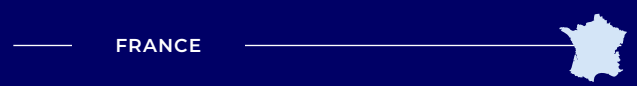
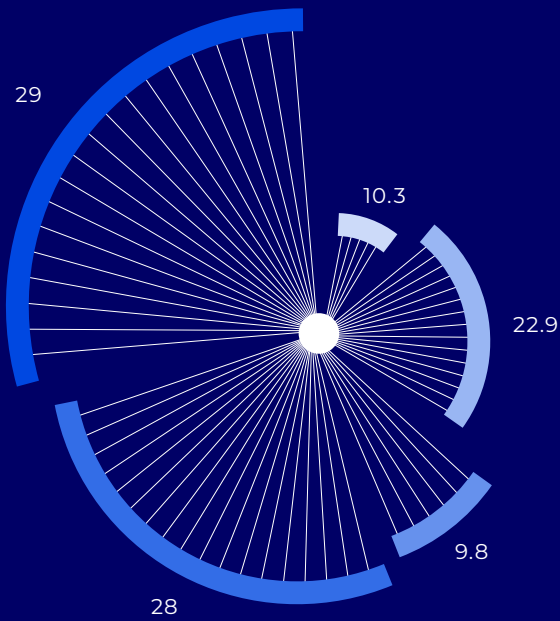
By the same token, British and French responders show a higher inclination to partake to the defense of their own country, or another European nation, in the case of military attack (36% and 35.2% respectively), with the Germans and the Spanish following with a slightly lower approval rate [Question 8]. It seems it is not a coincidence that this type of individuals is also showing high levels of national pride. This was very clear in the focus groups: **those not willing to participate in the defense of their country alluded to a lack of patriotic sentiment.** Yet, what looks significant in this specific answer is the low propensity (approximately one-third) of young people to embrace weapons before an existential menace. There is no single explanation for this, with the most logical being a further representation of an anti-militaristic culture, the rejection of a traditional sense of heroism, or the belief that mass conscription is no longer needed for today’s armed forces.

Q8

If [Country] or another European country were militarily attacked, would you be willing to volunteer to help defend it?

| PER COUNTRY (IN %)

■ YES, DEFINITELY ■ PROBABLY ■ DK/DA ■ PROBABLY NOT ■ NO, DEFINITELY NOT



... Q8

PER LEVEL OF NATIONAL PRIDE (IN %)

■ YES, DEFINITELY
 ■ PROBABLY
 ■ DK/DA
 ■ PROBABLY NOT
 ■ NO, DEFINITELY NOT



FOCUS GROUPS EXCERPTS ON PERCEPTIONS ON WILLINGNESS TO VOLUNTEER FOR THE DEFENSE OF THE COUNTRY

"I would not give up my life for something the politicians have done. I will protect my house, my family, and maybe the neighbors."

—MALE, 32 YEARS OLD, GERMANY

"Right now, with the housing crisis, people getting shot on the street... I don't feel that level of pride that I should, to aid in a defense crisis."

—FEMALE, 21 YEARS OLD, UK

"I would volunteer to participate in the defense of the UK, yes. Whether that's like on the front line, I wouldn't be so sure. But let's say we were into war and there was like a rationing crisis, I would want to help in terms of like, sorting other stuff out. I'm not saying go to the frontline and be in the army but there's obviously other ways to protect the nation if we were to enter war tomorrow. I think I would."

—MALE, 22 YEARS OLD, UK

"I would participate, not just to defend Spain as a nation but to defend my loved ones. Just for that reason, I think everyone should get involved. Do you think the people in Gaza wanted to get involved? No. Israel decided to invade, and they had to defend themselves. If they invade us, we must participate, either on the front line or in another way."

—MALE, 31 YEARS OLD, SPAIN

"I could not imagine joining because I would not be willing to give up my life for Germany."

—MALE, 22 YEARS OLD, GERMANY

"I don't have that much attachment to this country. I would move to another one. Honestly, I'm sorry. If it was obligatory, that's another matter."

—FEMALE, 27 YEARS OLD, SPAIN



3

VIEWS ON THE DEFENSE SECTOR

This section delves into the youth views on the defense sector. By doing so, it revolves around three broad topics: the perceived priorities of States, the estimation of what is an appropriate defense spending, and the dilemma between freedom and security.

As questions go deeper into the subject, it turns strikingly evident that participants have a very unclear idea of what national security is about, think that the defense sector should not be given a top priority in the government’s agenda, are uncertain in assessing whether their country needs to increase defense spending, and possess a very subjective opinion regarding a key tradeoff—liberty or safety—of the social contract in our liberal-democratic systems.

1. PRIORITIES OF THE STATE

As seen in the previous sections, in the focus groups young Europeans appear to share a similar definition of the concept of ‘defense’ and, at the same time, associate it with varying understandings. A traditional ‘hard’ idea of protection from external threats is often broadened to encompass aspects that go beyond the specific reference to military conflicts: protection of the economy and the civilian population, defense of a country’s interests, aid in times of disaster caused by natural phenomena, regulation of immigration, or the fight against cyber-attacks and disinformation. Beyond the strictly military sphere, the term defense is also associated with issues such as public safety and public order, protection of civil rights, and the prevention and peaceful resolution of conflicts.



FOCUS GROUPS EXCERPTS ON WHAT COMES TO THEIR MIND WHEN THEY THINK ABOUT DEFENSE

“I would think about protecting a country, the first thing that will come to mind is the military.”

— MALE, 32 YEARS OLD, GERMANY

“Cyber security, army, military defense, civil servants.”

— FEMALE, 21 YEARS OLD, UK

“Defending a country can mean protecting its economy. To defend your political and economic interests.”

— FEMALE, 32 YEARS OLD, FRANCE

“A reaction to an aggression.”

— FEMALE, 21 YEARS OLD, SPAIN

“I think it’s about protection from an attack. It could be in many kinds of contexts, [...] there’s loads of different types of defense policies.”

— FEMALE, 24 YEARS OLD, UK

“I would also think about preventing armed conflicts. Politics and diplomacy, communicating with other countries in order to prevent conflicts.”

— FEMALE, 19 YEARS OLD, GERMANY

“Maybe independence in terms of fuels. Our gas supply comes from Russia, which has really weighed down our defense in general.”

— MALE, 27 YEARS OLD, GERMANY

“The army is understood to be there to protect us from meteorological phenomena. Nowadays, with our age, that’s mainly what we know.”

— MALE, 31 YEARS OLD, SPAIN

“There is the defense policy of Western countries, which go to war with other countries either to protect their interests or to protect internal interests linked to colonization. [...] Such as for example the United States invading Iraq, or France interfering in countries like Libya.”

— MALE, 32 YEARS OLD, FRANCE

This varying and vague understanding of what defense entails may have influenced participants’ responses when asked to rank different issues based on the amount of State’s attention and resource allocation they should receive [Question 9]. Overall, 60.6% of participants across the four countries considers ‘security and defense’ to be somewhat important, with the highest concern in France (65%) and the lowest in the UK (55%). Nonetheless, the issue is not considered as important as investing in ‘health, including mental health’ (73%), ‘high quality education’ (68.5%), and employment’ (64.5%). Such ranking of priorities does not suffer significant variations based on participants’ nationality or control factors such as gender or education, and is confirmed in the focus groups in which security and defense is still ranked domestic social issues.

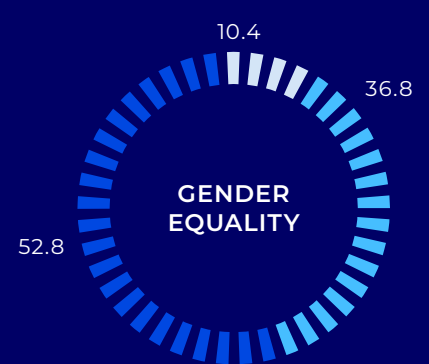
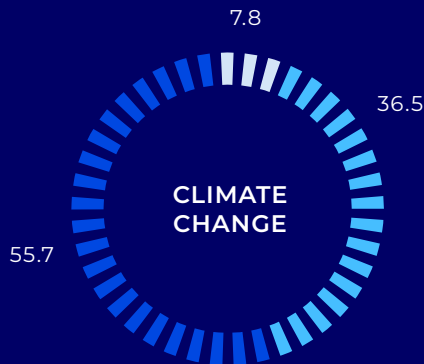
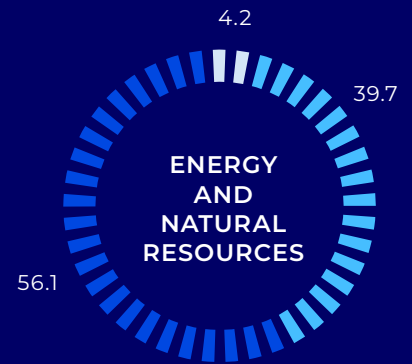
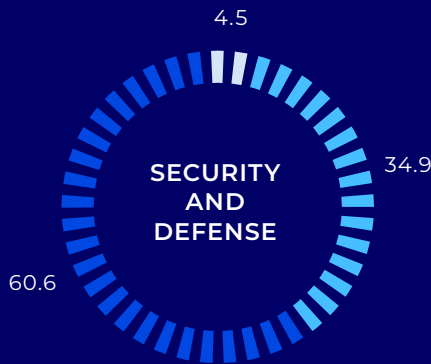
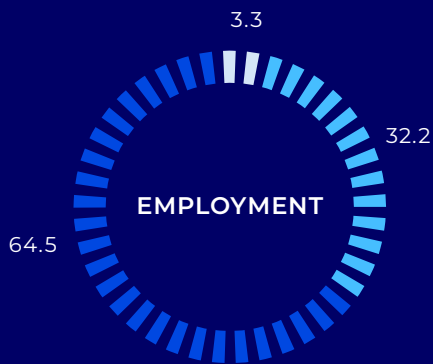
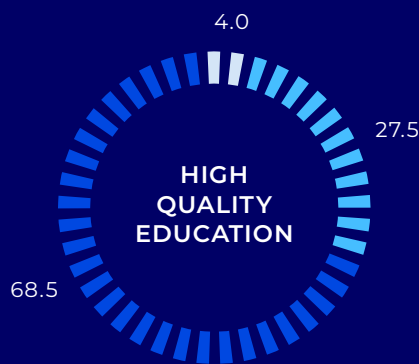
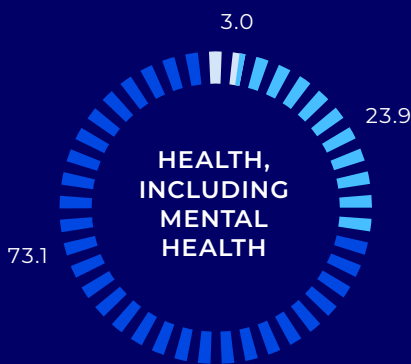
Q9

Rank the following issues according to which you think the state should pay more attention/allocate more resources to. Give your answer on a scale from 0 to 5, with 0 being 'least important' and 5 being 'most important'.

[In the graph responses on the scale of 0-1 were grouped as 'least important', 2-3 as 'medium', and 4-5 as "most important"]

EUROPEAN AGGREGATE OF ISSUES (IN %)

■ LEAST IMPORTANT ■ MEDIUM ■ MORE IMPORTANT



| FOCUS GROUPS EXCERPTS ON STATE PRIORITIES

“Social policies should be at a higher place compared to defense. Defense should also focus on cyber defense and avoiding disinformation propaganda. Decisions should be made taking into account the opinions of the citizens. Increasing expenditure in the defense sector can scare the citizens, so transparency is very important, so that there is trust.”

— FEMALE, 22 YEARS OLD, GERMANY

“I think defense is not such a priority because it’s not something that affects our daily lives. It’s true that right now there are the conflicts we talked about earlier, but they are further away. So, I think since it’s not something affecting our daily lives, we don’t consider it as much.”

— FEMALE, 30 YEARS OLD, SPAIN

“I prefer that we allocate more money to education, [...] we can react to a critical situation now but that will not solve the root of the problem. Hitting people or paying for more police and more prisons is a short-term solution. Why these people want to commit crimes? Are they not getting enough to eat? In my opinion, education, health, infrastructure... is the long-term solution.”

— MALE, 33 YEARS OLD, FRANCE

“Issues like social care, healthcare are by far the priority now. The country is not doing brilliantly at looking after its own people in pretty much every respect at the moment”.

— FEMALE, 26 YEARS OLD, UK

Once again, coherently with the analysis in the previous sections, young people recognize the importance of defense for their country, but they do not view it as a priority given the absence of an imminent threat to their own countries. Other issues and policies are perceived having a greater relevance for their daily lives. In other words, **defense and security are regarded as an occasional priority: important and necessary, but not a structural concern.**

As a matter of fact, we are talking about a further generation of young adults that has not experienced the effects of war on its own skin. Like the ‘baby boomers’ or the so-called ‘Generation X’, people born between the late 1990s and the early 2000s have been raised in a Europe dominated by the Kantian dream of a ‘perpetual democratic peace’—a peace that originates from the post-1945 US-led liberal international order and, despite recent developments and war at its doorstep, still represents the lodestar of European politics and society.

2. ESTIMATED DEFENSE SPENDING

As surprising as it might be, a **significant portion of respondents across all four countries believes that their country’s defense spending is adequate [Question 10].**

This statement is coherent with a previously observed result: a majority of respondents in all four countries argues that Europe can protect itself adequately without the US support [Question 3]. On the contrary, more than a third of participants in France, Germany, and Spain believes that defense spending in their countries is

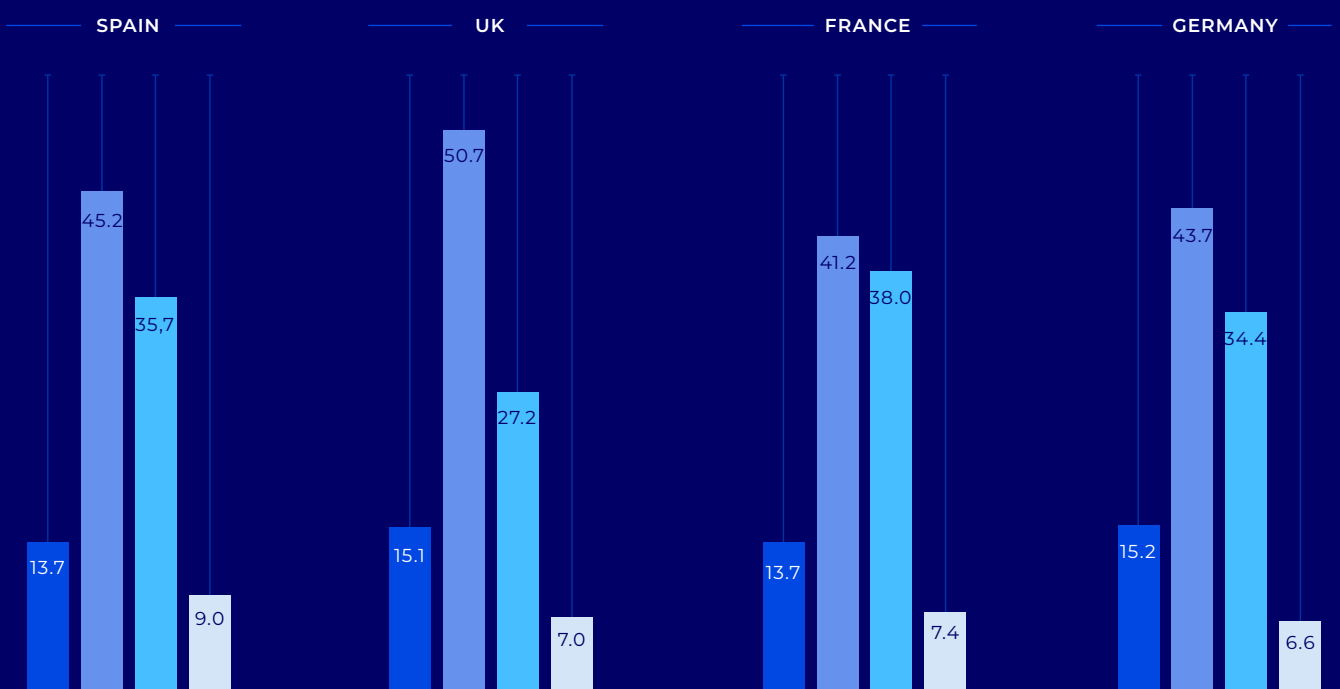
insufficient. The perception does not seem to vary significantly when taking into account a control factor like gender, while there is some variation if one considers the level of national pride. Once again, in the focus groups perceptions are more nuanced, but in many cases they reflect a lack of understanding of what spending on defense would be used for: those in favor of higher expenditure refer to external threats and the difficulty to recruit people, whereas those against claim that resources should be allocated to more important issues.

Q10

NATO leaders have pledged that defense spending should be set at least at 2% of GDP. In 2023, the resources allocated to defense in [COUNTRY] will be [France: 1.90% Germany: 1.57% Spain: 1.26% UK: 2.07%], would you say that the budget allocated to national defense for its actual needs is ...

| PER COUNTRY (IN %)

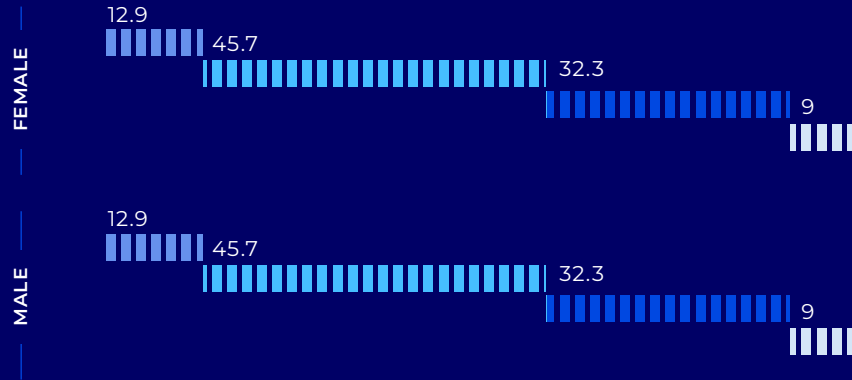
■ EXCESSIVE ■ ADEQUATE ■ INSUFFICIENT ■ DK/DA



... Q10

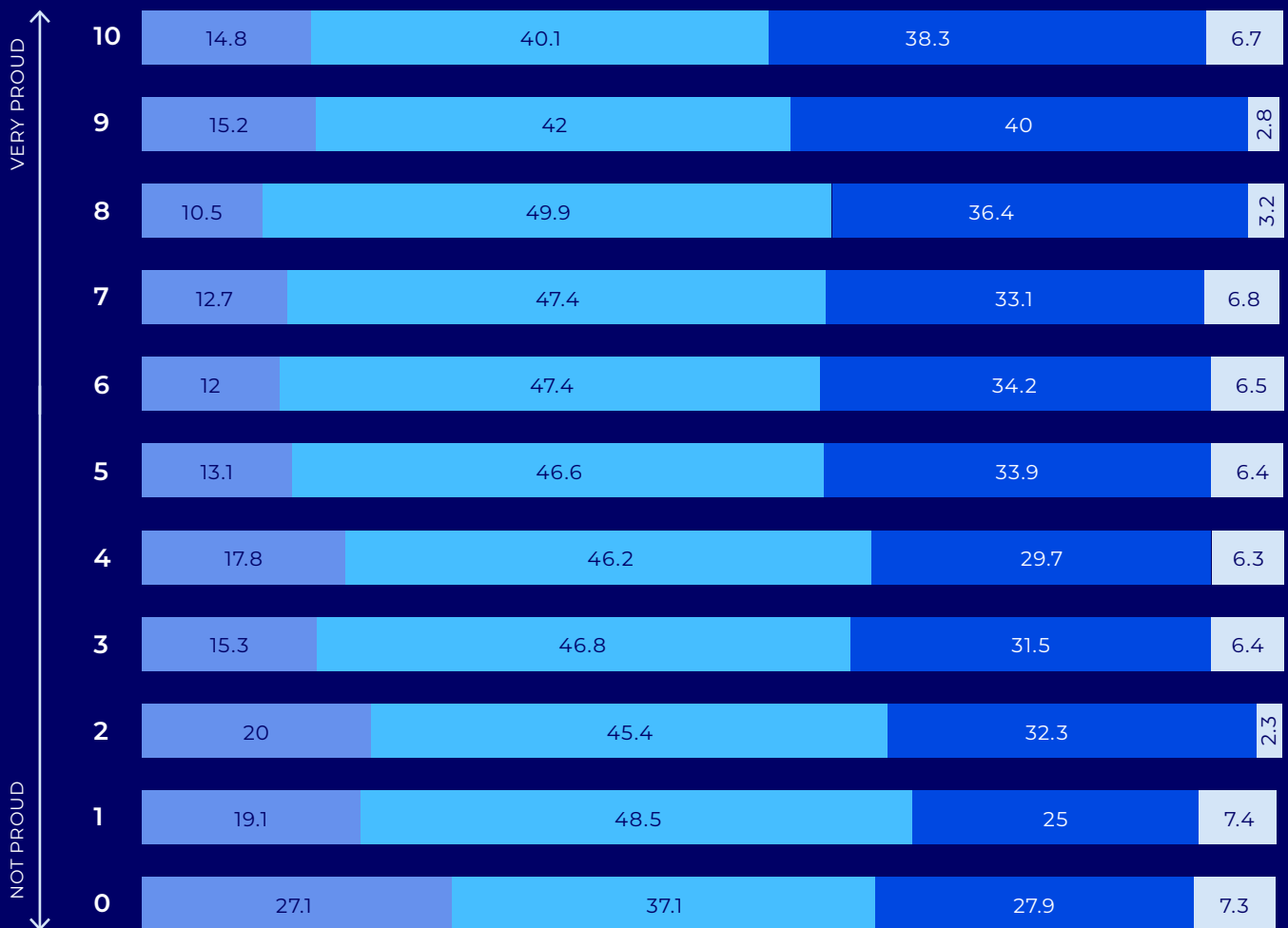
PER GENDER (IN %)

EXCESSIVE ADEQUATE INSUFFICIENT DK/DA



PER LEVEL OF NATIONAL PRIDE (IN %)

EXCESSIVE ADEQUATE INSUFFICIENT DK/DA



| FOCUS GROUPS EXCERPTS ON DEFENSE SPENDING

“I think it depends on your end goal. Do you want Britain to be safe with all its partners or allies or whatever? Do you want Britain to be safe on its own? Do you want Britain to rely on other people to protect them? All these things are going to impact the cost and how much you need to put into it.”

—MALE, 35 YEARS OLD, UK

“Look, I didn’t include it in my top priorities, but I am very much in favor of increasing defense spending. Not just because of what’s happening in Ukraine or Israel, but because I genuinely believe we are in a highly unstable time. Morocco, for example, a nearby country, is constantly “threatening” us. The world is so crazy that I think it’s essential to increase defense spending.”

—MALE, 31 YEARS OLD, SPAIN

“We need to increase the budget to be attractive and able to recruit.”

—FEMALE, 31 YEARS OLD, FRANCE

“For security, I think it should increase more because there are many neighborhoods, in Montpellier or elsewhere, which are inaccessible because there are gangs selling drugs and armed, which is unacceptable for a country like France. In my opinion we should invest more in security.”

—MALE, 23 YEARS OLD, FRANCE

“I don’t think we’re spending enough. You got Rishi Sunak saying that he’s going to ask people when they leave school to be forced into the military. That raises alarm bells that they do not have enough to spend on defense.”

—MALE, 32 YEARS OLD, UK

“I think defense expenditure is too high, I understand that it is based on the current situation with the wars and so on and can be justified based on this, but I feel that taking away from other sectors, for example, social investments or so, is not justified.”

—FEMALE, 19 YEARS OLD, GERMANY

When asked about expected future trends, more than half of respondents across the four countries anticipate a possible increase in defense spending [Question 11]. This expectation seems to be grounded on a belief in the necessity of enhancing defense capabilities to tackle global security challenges that are also expected to rise—these challenges being migration, armed conflicts caused by climate change, energy or natural resources shortages.

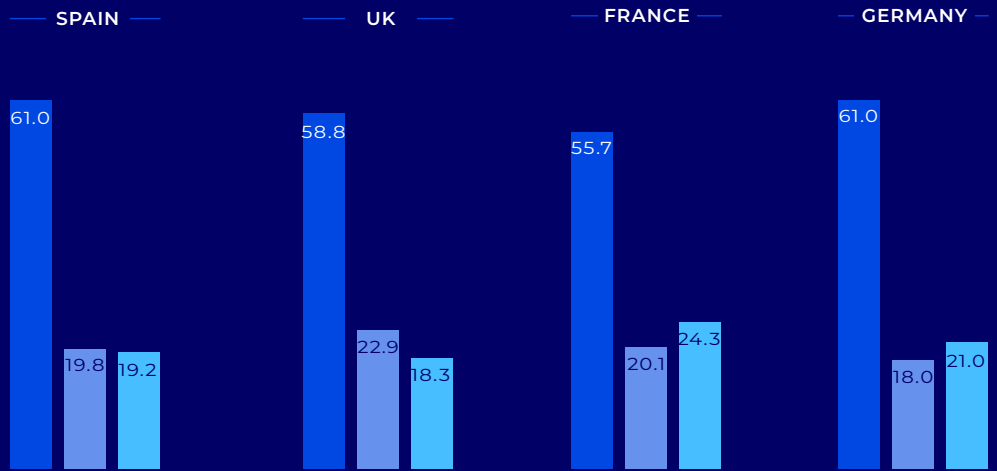
Q11

Please tell me if you think the following items will increase/decrease or stay the same in the following years ...

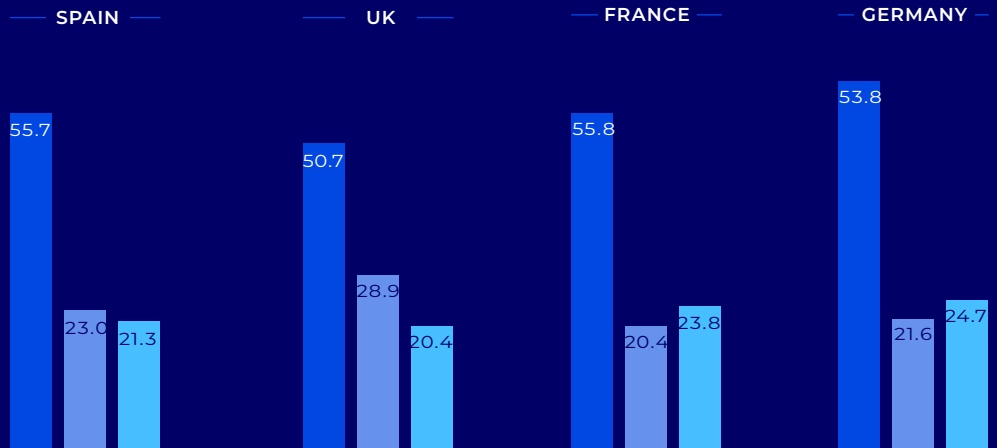
PER COUNTRY (IN %)

■ INCREASE ■ STAY THE SAME ■ DECREASE

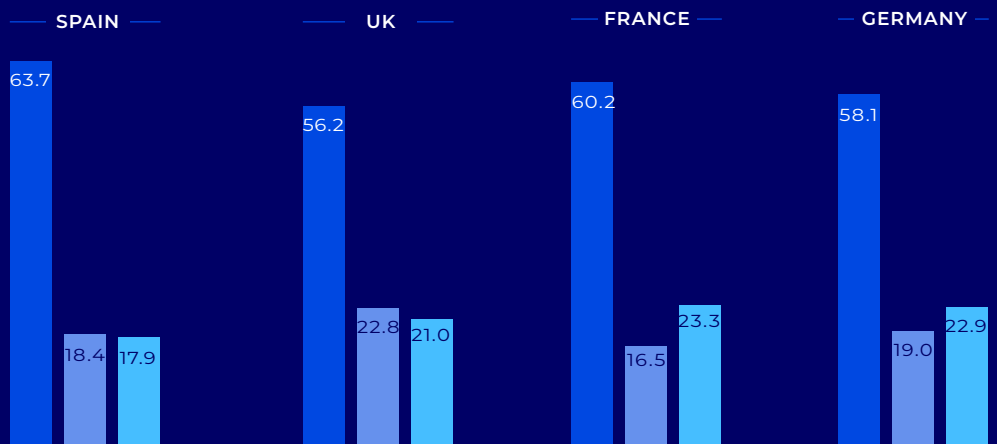
DEFENSE SPENDING BY EUROPEAN COUNTRIES



ARMED CONFLICTS CAUSED BY CLIMATE CHANGE, ENERGY AND NATURAL RESOURCES SHORTAGE



MIGRATION CAUSED BY CLIMATE CHANGE, ENERGY AND NATURAL RESOURCES SHORTAGE



FOCUS GROUPS EXCERPTS ON REASONS FOR EXPECTED INCREASE IN DEFENSE SPENDING

“It will increase, that’s for sure. We said, “OK the Second World War is over”. We made a union (EU), we expanded the union, the Soviet Union collapsed, so there was no longer a frontal enemy. It came back slowly with the fight against terrorism, but it was still quite punctual and quite distant. Whereas now, we are being shown that we have an army that is a little obsolete, things that have been and that we must strengthen all that because we are not safe when a new conflict breaks out at the gates of Europe.”

— FEMALE, 33 YEARS OLD, FRANCE

“I think it will increase in the future because of the nearby wars in Ukraine and Russia and the Gaza conflict.”

— FEMALE, 21 YEARS OLD, GERMANY

“If, for example, Russia attacks another European Union country, I think we would start to prepare a bit, maybe buy weapons or invest in emergency medical resources, preparing in case of a World War III, which is supposedly being debated. I think a global war will break out by 2030.”

— MALE, 32 YEARS OLD, SPAIN

“I think it will increase. Simply because we see a rise of the right and the far right and defense is their main topic. This is enough information to know that they are going to fully increase spending in this sector.”

— MALE, 32 YEARS OLD, FRANCE

In every focus group, the potential increase in defense spending sparked animated debates. Arguments in favor cite current global instability and the rise in external threats. On the other hand, arguments against remain based on the perception that other policy areas are inadequately funded. In addition, the discussion highlighted several differences in the way in which participants justify the need for higher defense spending. In France, for instance, some participants emphasized the need to bolster security in response to internal threats and gang violence in urban areas.

In any case, while young people expect migration and armed conflicts to rise, in the focus groups they justify the expectation of a higher defense spending by referring to the threat posed by Russia in the wake of its invasion of Ukraine, NATO’s commitment to respect the ‘2 percentage rule’, and the overall insecurity that characterizes the political landscape of today’s Europe. In addition, many participants stressed that governments should clearly communicate the allocation and use of defense funds to avoid public fear and distrust. This sentiment is echoed across all focus groups, underscoring the importance of balancing defense needs with public accountability and societal well-being.

3. FREEDOM VS. SECURITY

In this part, participants were asked to choose between prioritizing personal freedoms or enhancing security measures, reflecting their views on balancing civil liberties with national safety [Question 12]. **The results indicate a slight overall preference for security (51%) over freedom (44%).** Yet, significant differences and contradictions emerge highlighting how national experiences and cultural values shape public opinion on this issue. In France and Spain, the inclination towards security is higher (almost 56%): the result might be influenced by recent cases of social unrest, prompting a greater focus on maintaining order and safety. Instead, Germany and the UK show a more balanced perspective, with freedom getting a somewhat higher score—a sign that civil liberties get a more pronounced value.

Interestingly, this division does not seem to correlate strongly with the level of national pride. Instead, this division suggests a polarization within societies where different segments of the population express conflicting views on what should be prioritized in the context of national policies and personal values. Additionally, we see that a higher proportion of women favors security over freedom compared to men. This insight adds another layer of complexity to the discussion, as it shows that demographic factors such as gender also play a significant role in shaping people’s views on freedom and security. In addition, as previously said, it makes clear that there is no gender cleavage—i.e. men and women alike can develop an interest in defense and security.

Q12

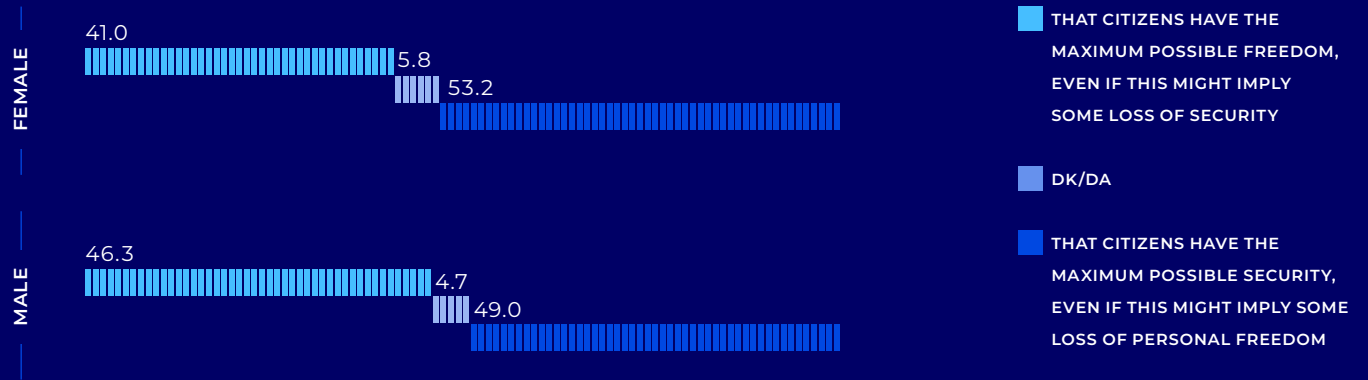
What do you personally think is more important?

| PER COUNTRY (IN %)

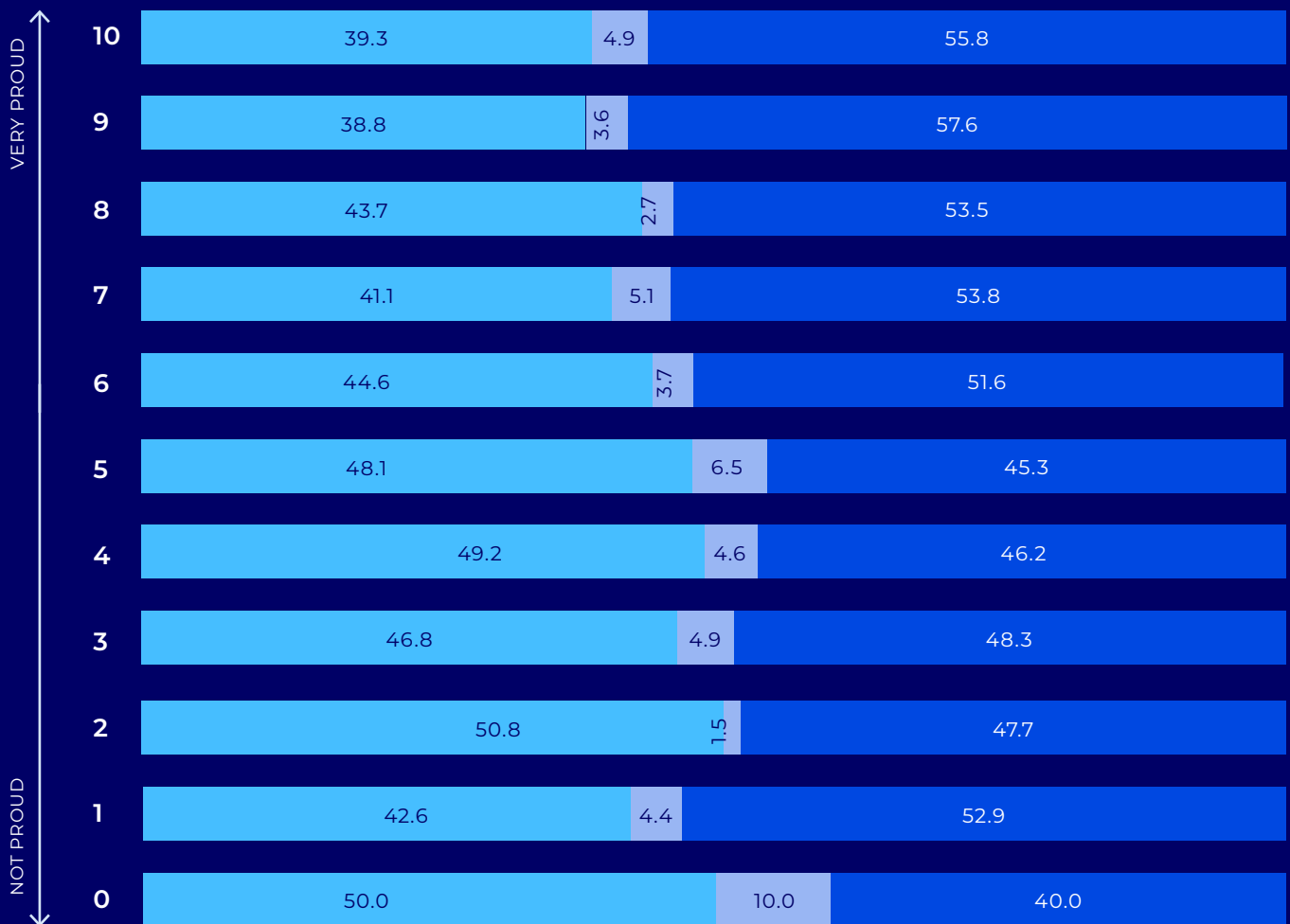


...Q12

| PER GENDER (IN %)



| PER LEVEL OF NATIONAL PRIDE (IN %)



4

COMPANIES IN THE DEFENSE SECTOR

Until now, we have evaluated young people's general perceptions of security and defense. But how much do they know about the companies in the defense sector or the dynamics of this field? It turns out: not much.

The fourth and final section assesses variables at the corporate level, such as the commitment of defense companies to issues such as peace, ecological sustainability, human rights protection, democracy, Europe's competitiveness, technological innovation and the overall presence and engagement of women in defense companies.

We see that a significant number of young adults is willing to work for defense companies, primarily for economic reasons and a sense of pragmatism. The problem is they do not even know whose door to knock on.

1. KNOWLEDGE AND PERCEPTIONS ABOUT THE INDUSTRY

When asked to define in what business sectors defense companies are involved in, the majority of respondents selected the option of 'military technology, vehicles, and electronics' (51%), followed by 'cybertechnology and intelligence' (38%), and 'defense contracting and services' (34%) [Question 13]. This is a reasonable, yet rudimentary ranking; despite some exceptions (e.g. 'space and aviation' for Spain), it overlooks the many other applications of the defense industry whose array of activities is definitely not confined to the purely military field. A more varied range of responses would have offered a more realistic and informed state of the art.

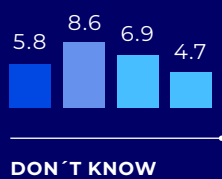
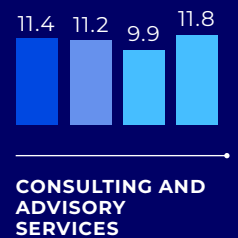
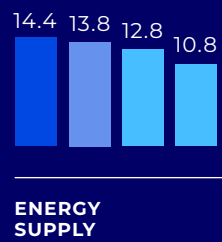
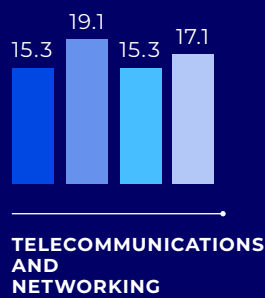
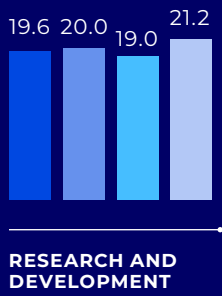
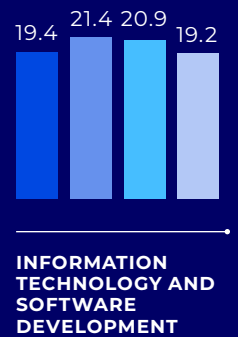
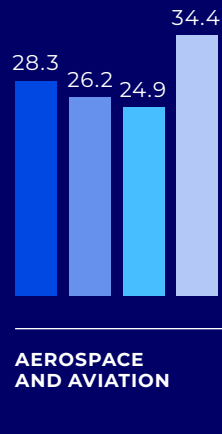
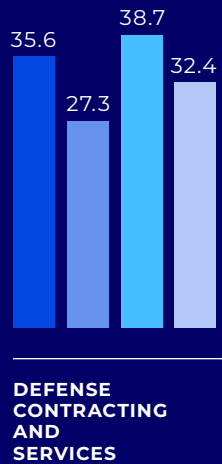
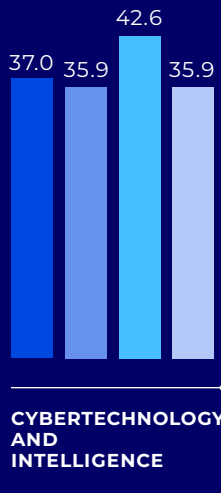
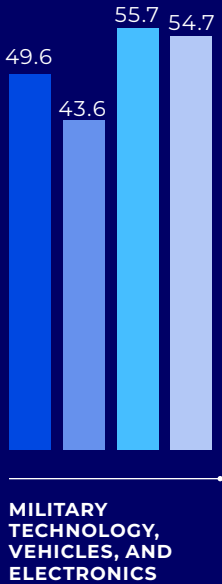


Q13

In which business sectors do you think companies in the defense industry are involved in? (Multiple answer question)

| PER BUSINESS SECTOR (IN %)

GERMANY UK FRANCE SPAIN



By the same token, when faced with a more explicit query, participants continue to provide quite straightforward answers [Question 14]: a consistent majority (more than two-thirds) recognizes the implications of the defense sector in stirring ‘technological and scientific innovation’ and ‘competitiveness and economic growth’; a less greater majority (around 62%) acknowledges the role of the sector in ‘protecting democracy and liberal values’ and contributing to ‘peace and conflict resolution’; but only 57% of respondents appreciate the commitment of defense companies in promoting ‘ecological sustainability, fight against climate change, and

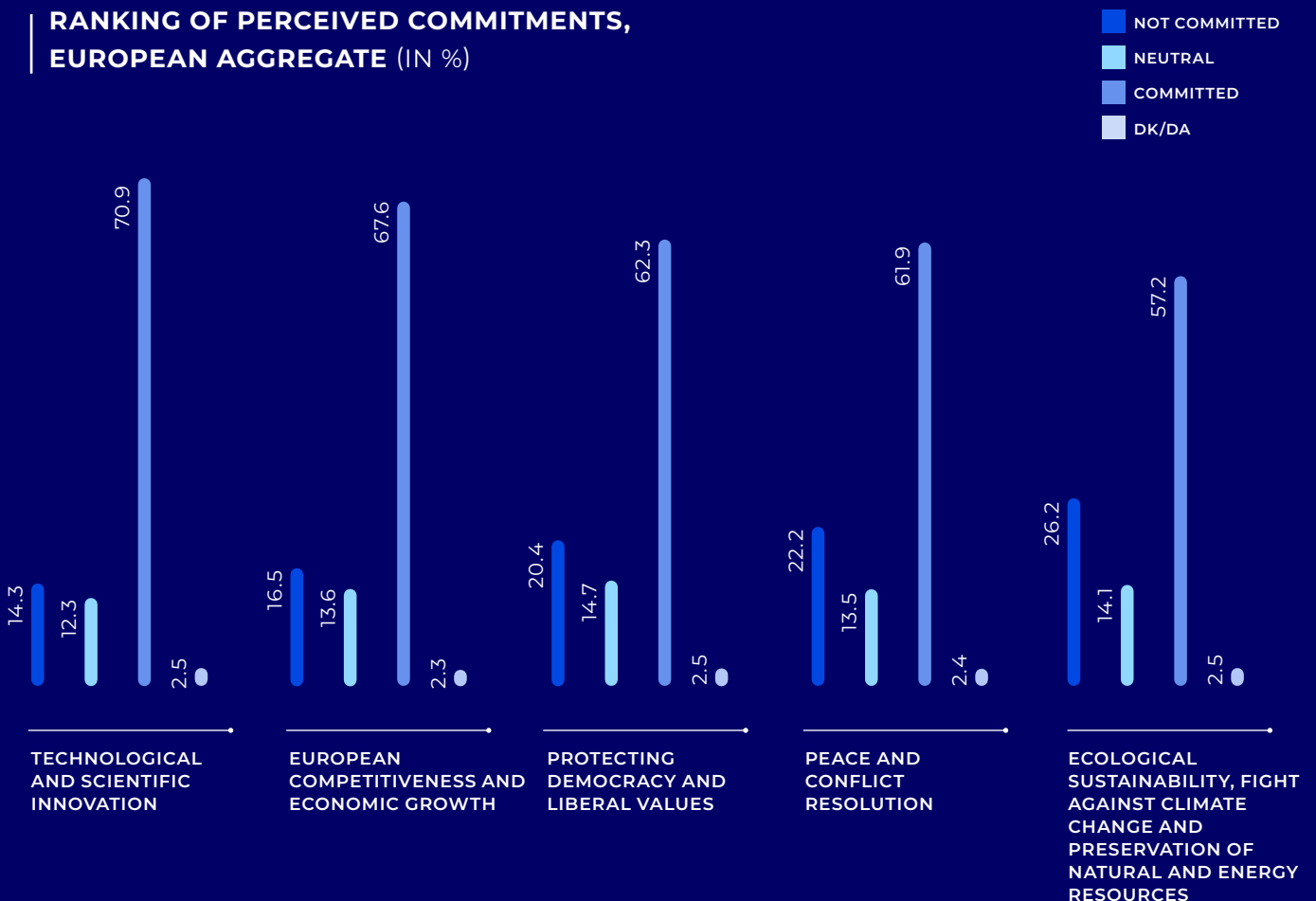
preservation of natural and energy resources’. Once again, the awareness of such type of commitments has a positive relationship with the level of national pride.

Young people who express a greater level of national pride might believe the defense sector is more committed to ecological sustainability and other issues due to a higher level of trust in national institutions and the perception of the defense sector as an embodiment of national duty and responsibility. They may believe, for instance, that this duty extends to protecting the environment as part of safeguarding the nation’s future.

Q14

To what extent do you think companies in the defense sector are committed or not committed to the following objectives? For each objective, express your answer on a scale of 0 to 10, where 0 means “not committed” at all and 10 means “fully committed”. [Answers have been aggregated in the graphs for clarity: 0-5: non committed; 5: neutral; 6-10: committed]

RANKING OF PERCEIVED COMMITMENTS, EUROPEAN AGGREGATE (IN %)

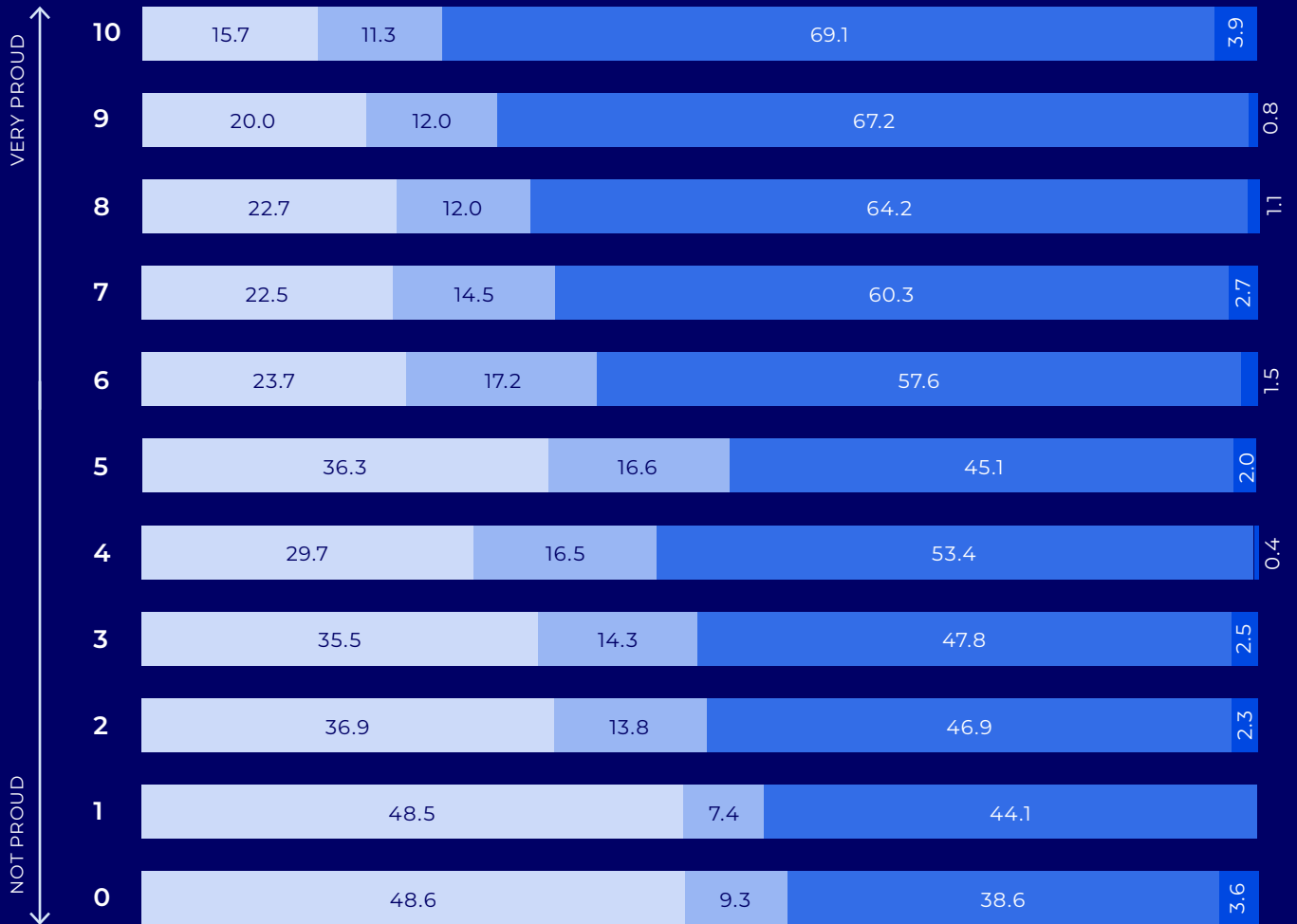


... Q14

COMMITMENT TO ECOLOGICAL SUSTAINABILITY, FIGHT AGAINST CLIMATE CHANGE AND PRESERVATION OF NATURAL AND ENERGY RESOURCES.

PER LEVEL OF NATIONAL PRIDE (IN %)

NOT COMMITTED
 NEUTRAL
 COMMITTED
 DK/DA



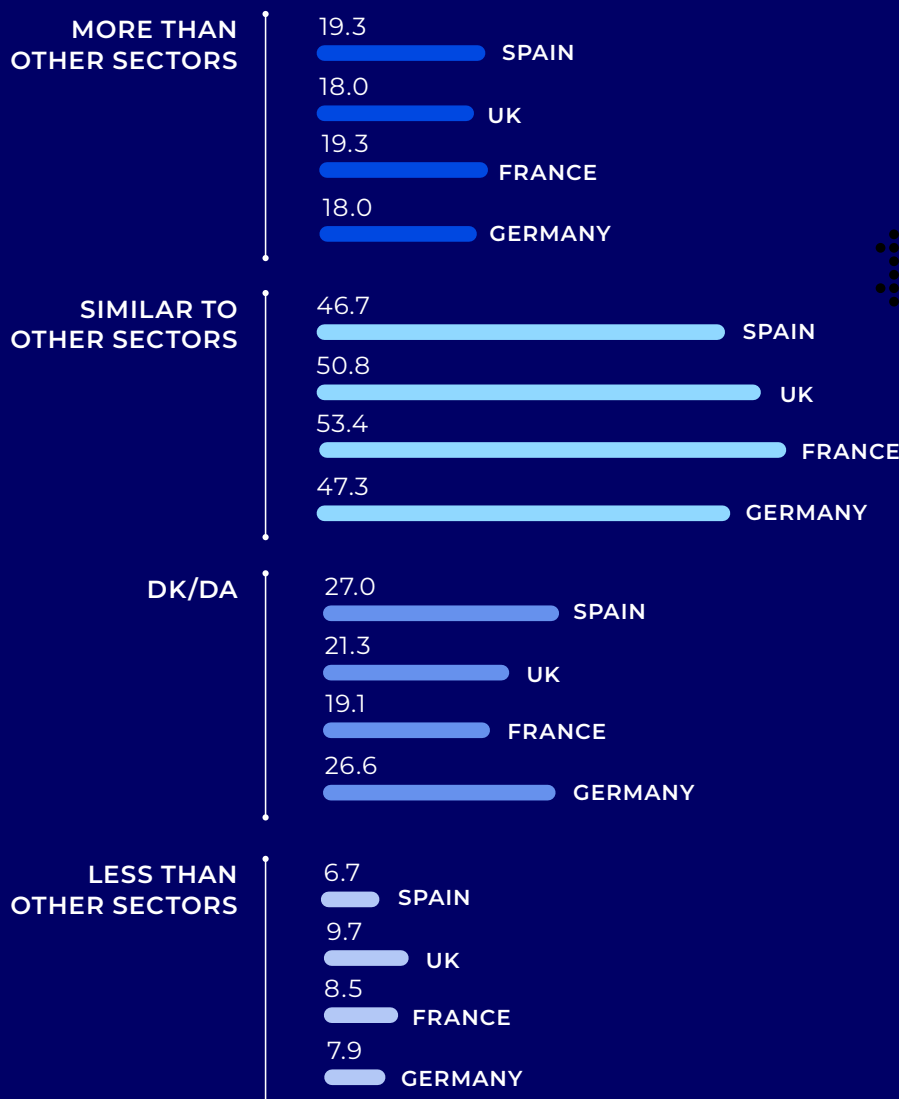
In the focus groups many participants signaled a basic knowledge about the compromise of defense companies in promoting gender equality [Question 15]. They justify this answer by admitting that they do not consider gender imbalances and the fight against climate change a priority for the defense companies. On the other hand,

it is worth noting that some participants pointed out that the technological innovation developed by the sector can have positive outcomes for society, for example, by developing more efficient and less polluting technologies.

Q15

Over the last few decades many industries have increased the presence of women in their workforces and in their leadership positions. In the case of the defense sector, would you say that it has?

PER COUNTRY (IN %)



FOCUS GROUPS EXCERPTS ON COMMITMENT OF DEFENSE COMPANIES TO DIFFERENT ISSUES

“I think they are not committed to social welfare; defense companies are by nature for profit institutions. If it’s growth and expansion of the defense sector for the sake of like profit and growth that’s broadly not going to be consistent with aims of social welfare systems.”

—FEMALE, 21 YEARS OLD, UK

“I don’t think they are committed to gender equality. Maybe within their company they’re not biased towards one gender or another. But if they’re supplying arms or are partners with states which don’t see gender equality like the western world, they can’t really say they’re committed to it.”

—MALE, 22 YEARS OLD, UK

“No, these companies are not defending sustainability and climate change. The plane will fire 40 missiles per second and remove carbon emissions? No. Perhaps there could be repercussions in relation to an engine which will be more efficient, and which be used for the civilian sector, but that is not the primary goal.”

—MALE, 33 YEARS OLD, FRANCE

“Technological innovation is crucial in this sector. They must be innovative. But above all to be profitable.”

—MALE, 33 YEARS OLD, FRANCE

“I can imagine that they support sustainability and the fight against climate change because it has a positive external impact. And because there are laws in this regard that must be complied with. But improving the climate is not their goal.”

—MALE, 27 YEARS OLD, GERMANY

“I would think that the focus of these companies is not necessarily on European values and democracy, even if it sounds terrible, but it is focused on revenue.”

—FEMALE, 19 YEARS OLD, GERMANY

“I think that innovations contribute to this because climate change is becoming an international priority today. I think that over time, innovations will have to be more ecological in all cases.”

—MALE, 23 YEARS OLD, FRANCE

“I do think that many companies in the defense sector are committed to European values and democracy. I think they work very closely with European governments, and they follow a very strict regulation that reflect democratic principles and just overall respect for human rights.”

—FEMALE, 21 YEARS OLD, UK

“I’d say that they’re not committed to sustainability or climate change. I think war is incredibly bad for the environment.”

—FEMALE, 26 YEARS OLD, UK

Perhaps the most striking result of this section is the astonishing lack of awareness regarding private companies involved in the defense sector. Overall, 90% of respondents across all four countries could not name any defense companies.

This ignorance is most pronounced in Spain (94%), followed by the UK (91%), France (88%), and Germany (87%). The few participants who claimed to know one or more private defense companies named the following ones:

RHEINMETALL	0% SPAIN	0% UK	0% FRANCE	7% GERMANY
DASSAULT SYSTEMES	0% SPAIN	0% UK	4% FRANCE	0% GERMANY
AIRBUS	1% SPAIN	0% UK	1% FRANCE	1% GERMANY
THALES GROUP	0% SPAIN	1% UK	2% FRANCE	0% GERMANY
BAE SYSTEMS	0% SPAIN	3% UK	0% FRANCE	0% GERMANY
SAFRAN	0% SPAIN	0% UK	1% FRANCE	0% GERMANY
THYSSEN-KRUPP	0% SPAIN	0% UK	0% FRANCE	1% GERMANY
HECKLER AND KOCH	0% SPAIN	0% UK	0% FRANCE	1% GERMANY
INDRA	1% SPAIN	0% UK	0% FRANCE	0% GERMANY
LOCKHEED MARTIN	0% SPAIN	1% UK	0% FRANCE	0% GERMANY
OTHERS	4% SPAIN	6% UK	8% FRANCE	6% GERMANY

NOTE: The percentages represent the percentage of participants per country that cited the company among those that claimed to know at least one defense company (~10%). Note that participants were allowed to name more than one company.

This widespread unfamiliarity underscores a significant disconnection between the defense sector and the public, particularly among the younger generation. These very low levels of awareness may reflect a broader disengagement as well as a structural lack of information about the many different activities of national defense industries as well as the uses of their research programs. Undoubtedly this has a number of implications for public support and understanding of defense policies and

spending. At the same time, it underlines a manifest lack of knowledge of the overall governance of the defense sector, namely the relationship between the public and the private sector. The communication strategies and public diplomacy initiatives of defense companies is an aspect that, apparently, requires significant improvement.

2. LEGITIMACY AND WILLINGNESS TO WORK

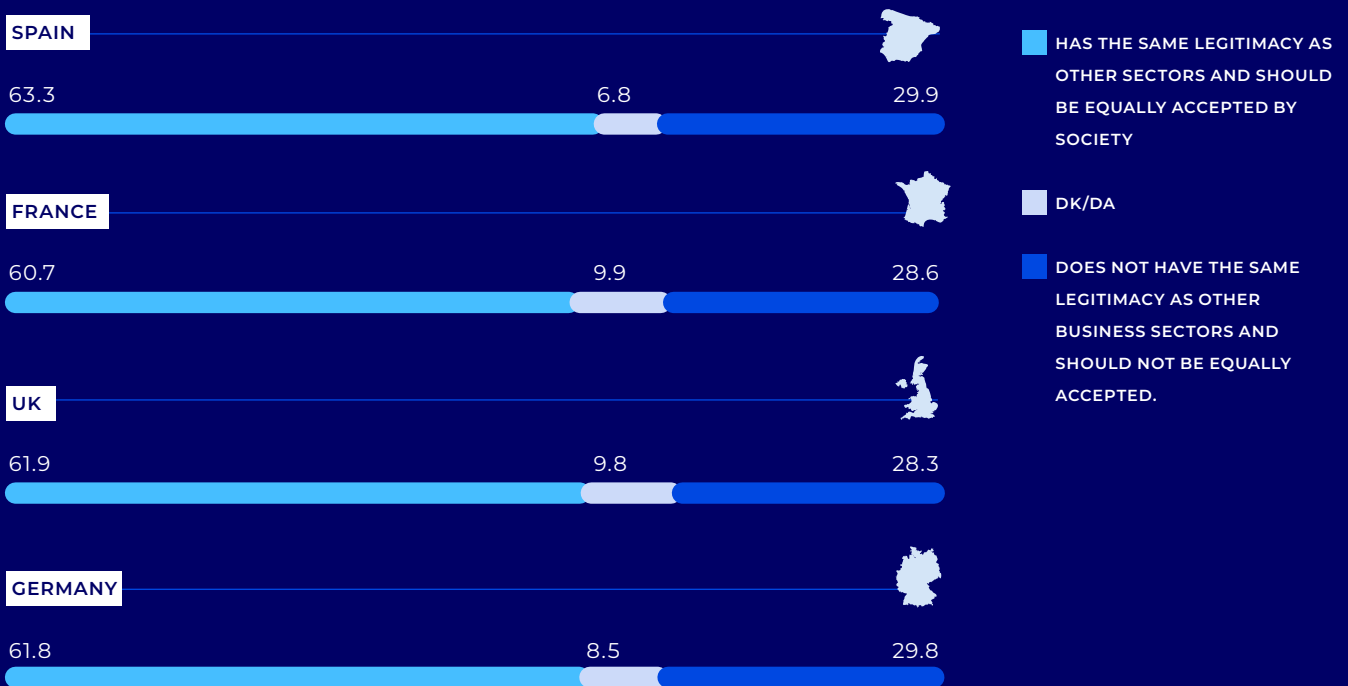
Despite the abovementioned perception that defense companies are not highly committed to social issues, **participants across the four surveyed countries appear to believe that defense companies' economic activities are as legitimate as those of other sectors and should be equally accepted** [Question 16]. This sentiment is consistent across the four countries, with minimum variations from one case to another. Nonetheless, there is still a significant minority that holds a polar opposite opinion: approximately 29% of respondents believe that defense companies do not hold the same legitimacy and, therefore, should not be equally accepted.

As expected, the perception of legitimacy varies significantly with the level of national pride. Among those who are very proud of their country (scoring 10 on a scale of national pride), over 70% believe that defense companies have the same legitimacy as other sectors. As national pride decreases, this acceptance diminishes progressively. For example, at a national pride level of 7, around 60% still support the legitimacy of defense companies. This trend illustrates that, all other things equal, higher levels of national pride correlate with greater acceptance of defense companies' economic activities, while lower national pride levels correspond to increased skepticism about their legitimacy.

Q16

In your opinion, the economic activity of companies in the defense sector ...?

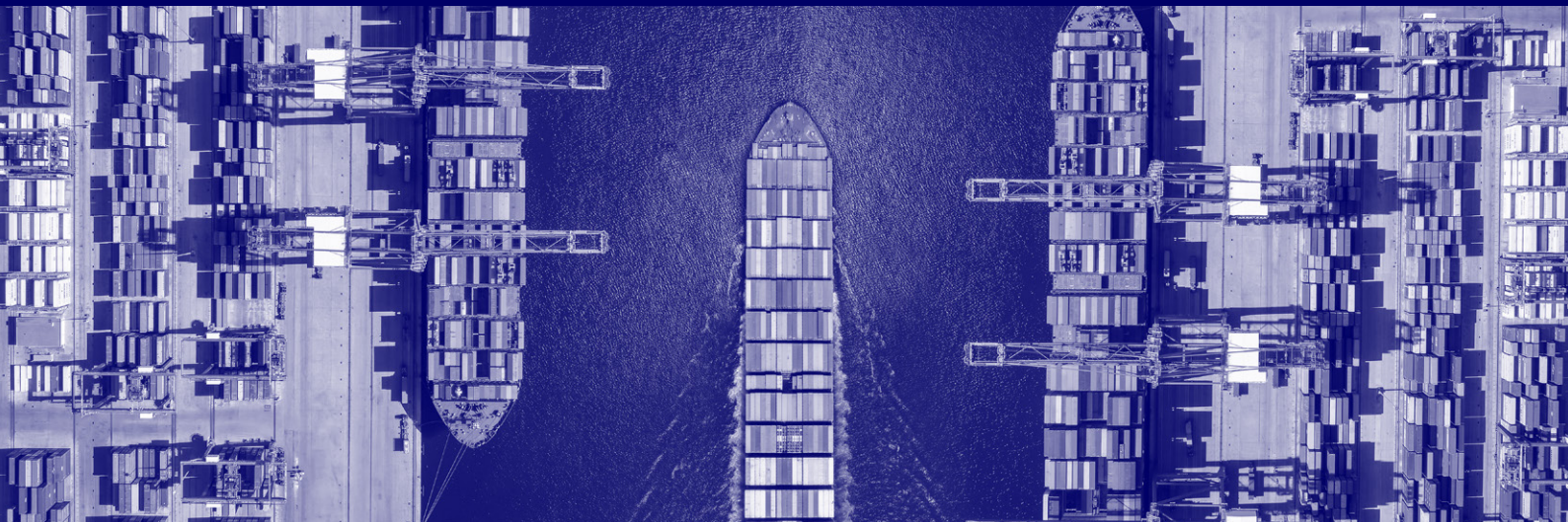
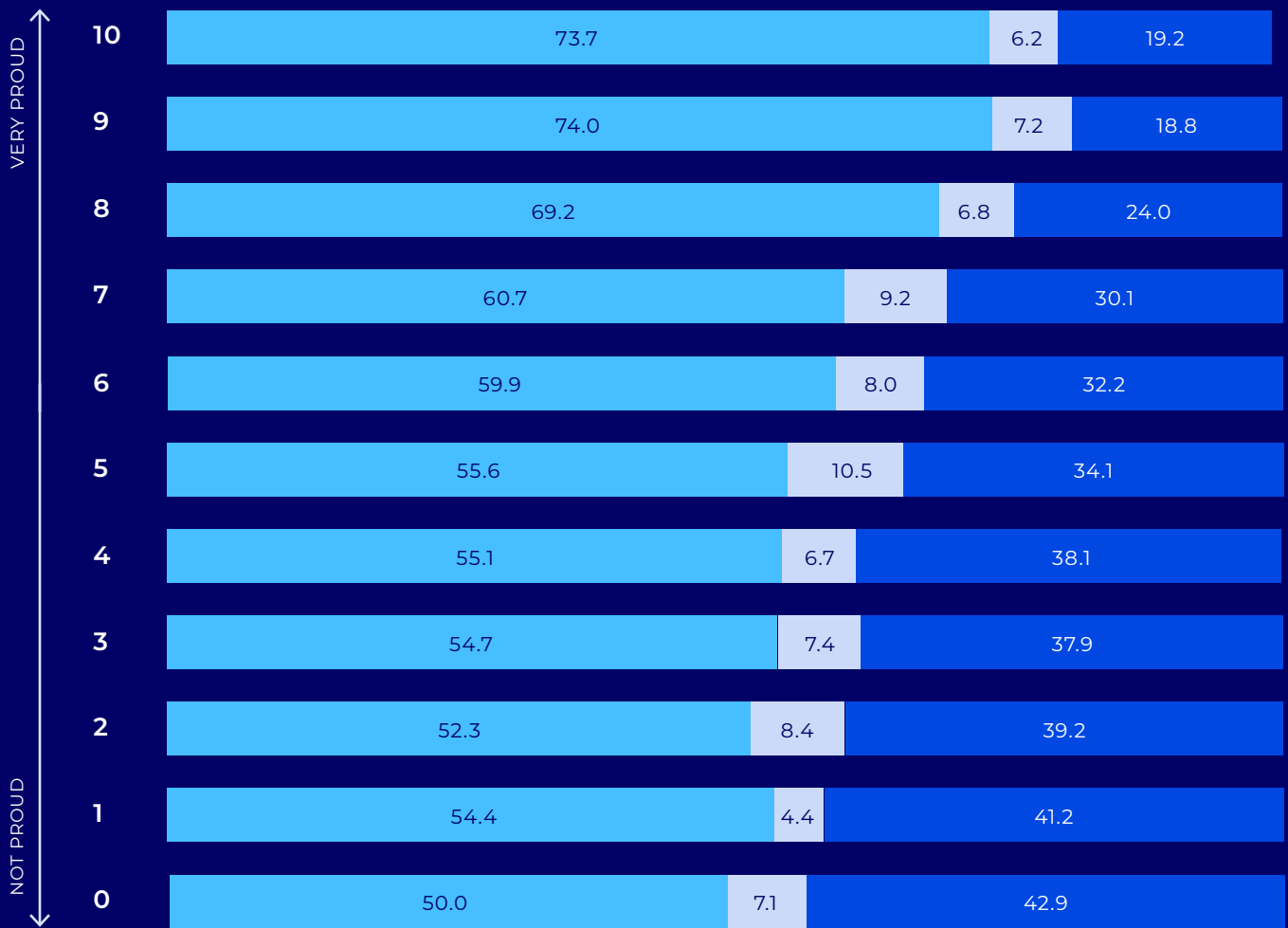
| PER COUNTRY (IN %)



...Q16

| PER LEVEL OF NATIONAL PRIDE (IN %)

■ HAS THE SAME LEGITIMACY AS OTHER SECTORS AND SHOULD BE EQUALLY ACCEPTED BY SOCIETY.
 ■ DK/DA.
 ■ DOES NOT HAVE THE SAME LEGITIMACY AS OTHER BUSINESS SECTORS AND SHOULD NOT BE EQUALLY ACCEPTED.



Regarding the willingness to work in the defense sector, results indicate that around two-thirds of respondents are open to the idea [Question 17]. This willingness is most pronounced in France (71%), followed by Spain (69%), Germany (66%), and the UK (63%). Gender differences are notable, but still demonstrate the

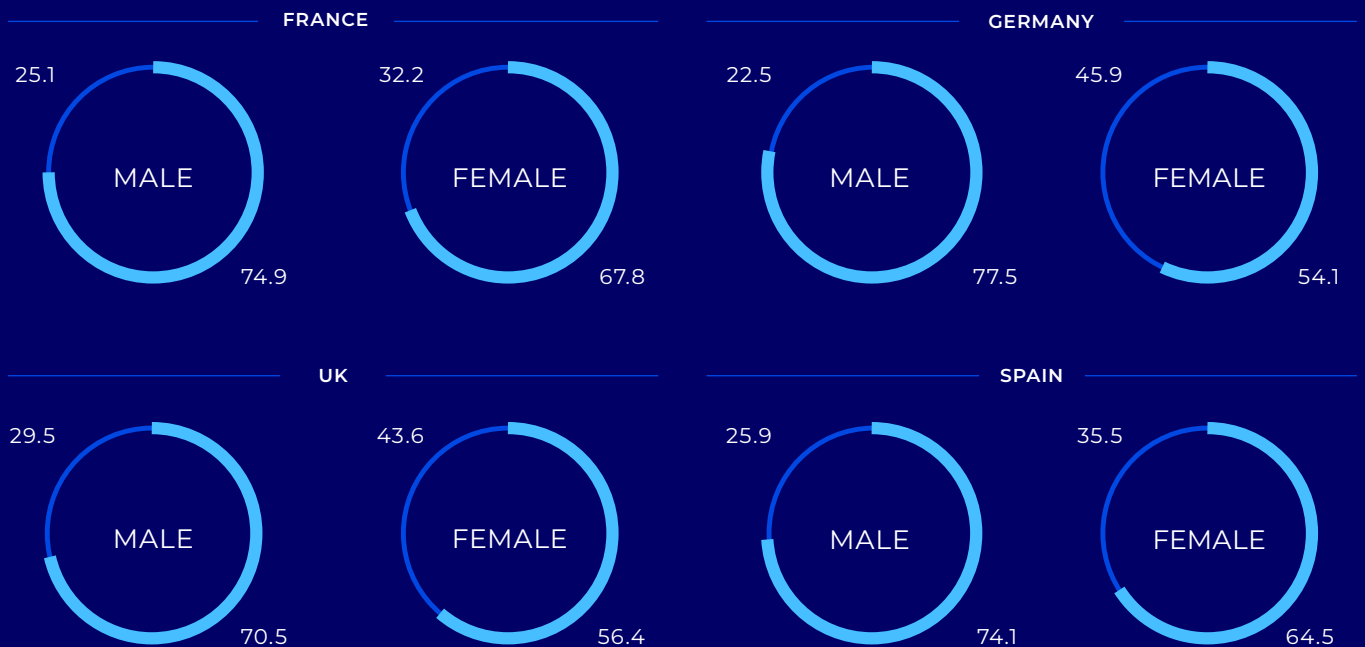
existence of a consolidated pattern: while men show a higher propensity than women to pursue a professional path in the defense sector, the majority of both groups does not exclude *a priori* this possibility. A fact that we believe is worth being remarked.

Q17

Would you work in a company dedicated to the defense sector?

| PER GENDER AND COUNTRY

■ YES, I WOULD ■ NO, I WOULDN'T



The follow up question in the survey asked participants to write the reason why they would work or not in a defense company. On the one hand the most frequent reason given to justify the willingness to work in a defense company was to protect one's country (25% on average), particularly in France (33%). Other important reasons include a positive perception of the sector (21%) and the interesting nature of the work (18%).

On the other hand, the most common reason for not being willing to work there working was the somehow vague negative perception of the sector (36% of) particularly in the UK and Germany (42% each). Lack of

interest is another important reason (23% overall), followed by a lack of information (13%) and lack of skills or training (9%).

In the focus groups, the reasons given by the participants willing to work in these companies were more pragmatic and straightforward: most would do it for economic reasons. However, a good number of them said they were unaware of the activities that this business sector carries out and those that they themselves could carry out in it. The participants that were against it cited moral objections and a general aversion to participating in activities they perceive as contributing to violence.

| FOCUS GROUPS EXCERPTS ON WILLINGNESS TO WORK IN DEFENSE COMPANIES

“It’s a cold truth but people need to make a living. If it doesn’t involve harming people, then yes. People will take jobs to survive, even if it means working in defense”.

—FEMALE, 21 YEARS OLD, SPAIN

“I would work for one of these companies. These are big companies with big budgets and interesting projects. Of course it depends on the position, but in the end, we are just a link in a chain. In any case, I wouldn’t have to think about it for too long”.

—MALE, 33 YEARS OLD, FRANCE

“I think any skills that you gain from a company in the defense sector are important. I think after that you’ll be very likely to get any job you wish. And honestly if they’ll hire me and they’ll pay me what I need to be paid I would do anything. I think I’d struggle if I was working for a company that was super pro-Israel. I think emotionally it would be very hard but also at the end of the day you must reach a point where you, “Well, this is my job and they’re paying me to live and afterwards I’m going to have all of these skills.”

— FEMALE, 21 YEARS OLD, UK

“Yes, I would work in a company of the defense sector. It’s just that it’s not my first choice but if I must end up working there, I won’t have any moral problems with that. Not at all.”

—MALE, 32 YEARS OLD, FRANCE

“Yeah. I don’t really know much about the companies, their morals or values but I guess if it had a role that I was interested in I don’t see why I wouldn’t I’d probably have to do some more research first but let’s say anything was positive I probably would. I guess I would consider things such as: do they supply weapons to certain states? Are they involved in certain conflicts? What are their projects in general? What will my work affect on a wider global scale?”

—MALE, 22 YEARS OLD, UK

“I would join for economic reasons. We sell ourselves for less. Money often trumps ethics in decision-making”.

—MALE, 31 YEARS OLD, SPAIN

“I wouldn’t feel at ease participating in a war, knowing that my actions as an engineer might contribute to people being killed. With my principles and conscience, I wouldn’t feel comfortable.”

—FEMALE, 30 YEARS OLD, SPAIN

These quotes reflect broader skepticism and moral conflicts associated with the defense industry, contrasting sharply with the survey’s more positive portrayal of willingness to work in the sector.



CONCLUSIONS

CONCLUSIONS

This report is an initial, yet thorough and comprehensive analysis of what young adults think about the security and defense sector. The study has been conducted in four Western European countries (France, Germany, Spain, and the UK) through a survey of 58 questions and deployed through 3,600 online interviews. To go deeper into the results, four focus groups (one per country) have been organized, each of which included six to eight participants aged 18 to 35, with an even split between men and women. The survey's four main areas referred to the youth's perception of: today's major threats; States' national security and defense policies; governments' priorities; role of defense companies.

This report integrates a combination of positive and disappointing results—while some were expected, other were unforeseen and surprising. What is perhaps the most defining feature of the study is the relatively common type of answers displayed by participants: young Europeans possess a shared amount of views and attitudes towards national defense, although this does not automatically translate into a well-defined culture of security. Despite exceptions, in most of the cases variations are minimal and usually unrelated to control factors like gender or nationality; instead, cognitive mechanisms or socio-cultural factors seem to play a larger role.

WHAT ARE THE KEY LESSONS THAT WE HAVE LEARNED? IT SEEMS THEY CAN BE SUMMARIZED IN THE FOLLOWING POINTS:

1

The youth reveal the lack of a commonly accepted definition of States' defense policies: not only 'soft' priorities coexist with 'hard' ones, but domestic-oriented goals are often assessed as almost important as external-oriented ones. This fact is largely due to the context in which they are born and educated: the Kantian myth of a perennial democratic peace, of which Europe has been for decades the clearest representation. Unless they are not exposed to events that directly affect their own security (e.g. geographical proximity), the youth are neither keen nor trained to think in 'strategic' terms.

2

The youth seem to have unclear ideas on the issue of European defense spending: many do not know whether the current level of military expenditure is adequate or not, or whether Europe needs the US for its own security, but a clear majority recognizes that defense budgets are bound to increase in the future. However, they show a clear unwillingness to send troops for armed military operations or volunteer to defend their country or an ally in the case of an attack. Also, there is a common understanding that Europe runs behind other powers (e.g. China) in the case of generative AI technology; however, it remains unclear what should be the reach and the scope of this new warfare domain.



3

The youth demonstrate a striking superficial knowledge about the mechanisms, the actors, and the activities of the defense sector. Not only 90% of the participants are unable to mention the name of a defense company, but also a good number of them ignores the multiple applications of the products developed by defense companies. In addition, while participants are aware of the contribution of the defense sector to bolster Europe's technological development and industrial competitiveness, they are also unaware of the commitment of defense companies to reduce gender inequality, to prevent crises, to protect lives, our values and vital infrastructures, and to restore damaged ecosystems and post-conflict areas. And most of them do not consider it a priority or a fact worth being stressed.

4

The youth display a clear sense of pragmatism when asked about their willingness to explore employment opportunities in a defense company: they do not assign an ethically inferior role to the sector and—what is more—are usually open to receive more information.

To sum up: it is evident that there is a major disconnection between society—the youth, in particular—and the defense sector. This is primarily due to a widespread and deep unfamiliarity with what governments and companies do in this field. But such a lack of awareness is hardly a one-way process and can be attributed to a number of cultural and psychological factors (individuals) as well as to inadequate communication (governments and companies).

We are fully aware of the intrinsic strategic value of the issues at stake, but we also see that there is a significant room for improvement. In particular, we believe that it would be possible and beneficial for the whole of the defense sector to enhance transparency and design better marketing campaigns. In the case of governments, a few respondents in focus groups emphasized the importance of knowing how policymakers allocate resources, particularly in areas like defense spending.

The lack of transparency in these matters leads to a loss of trust, making people feel uneasy and skeptical about supporting higher defense expenditure. In the case of companies, many respondents—as said—were unaware of the steps taken to integrate and promote environmental sustainability into their operations or of the contribution of defense companies to develop new technologies which can be applied in the civilian sector. Better communication strategies, therefore, seem to be needed.

Young Europeans are certainly not indifferent to the world of defense and security and the major issues at stake. Yet, their opinions are largely unstructured and filtered by their daily life or direct experiences. Their awareness of such topics remains on the surface. But there is window of opportunity for them to achieve a broader and deeper understanding of what the world of defense and security is and how it works—a window that has to be disclosed and opened by the defense sector itself.

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This report is part of the Next Generation Security Program, a research program in partnership with Airbus Defence and Space that seeks to understand and address how young Europeans perceive the international security landscape and the defense industry. The team behind this program would like to thank Metroscopi and everyone at the advisory board for their collaboration in the design, execution, and analysis of the surveys and focus groups used to produce this report.

Note: The views expressed in this report do not necessarily reflect those of IE University or Airbus.

WRITTEN BY:

Michele Testoni, Juan José de Arriba and Quynh Dinh

RECOMMENDED CITATION:

Testoni, M., de Arriba, J.J. & Dihn, Q., "Next Generation Security: A study on how young Europeans perceive the defense sector", IE CGC, October 2024.

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