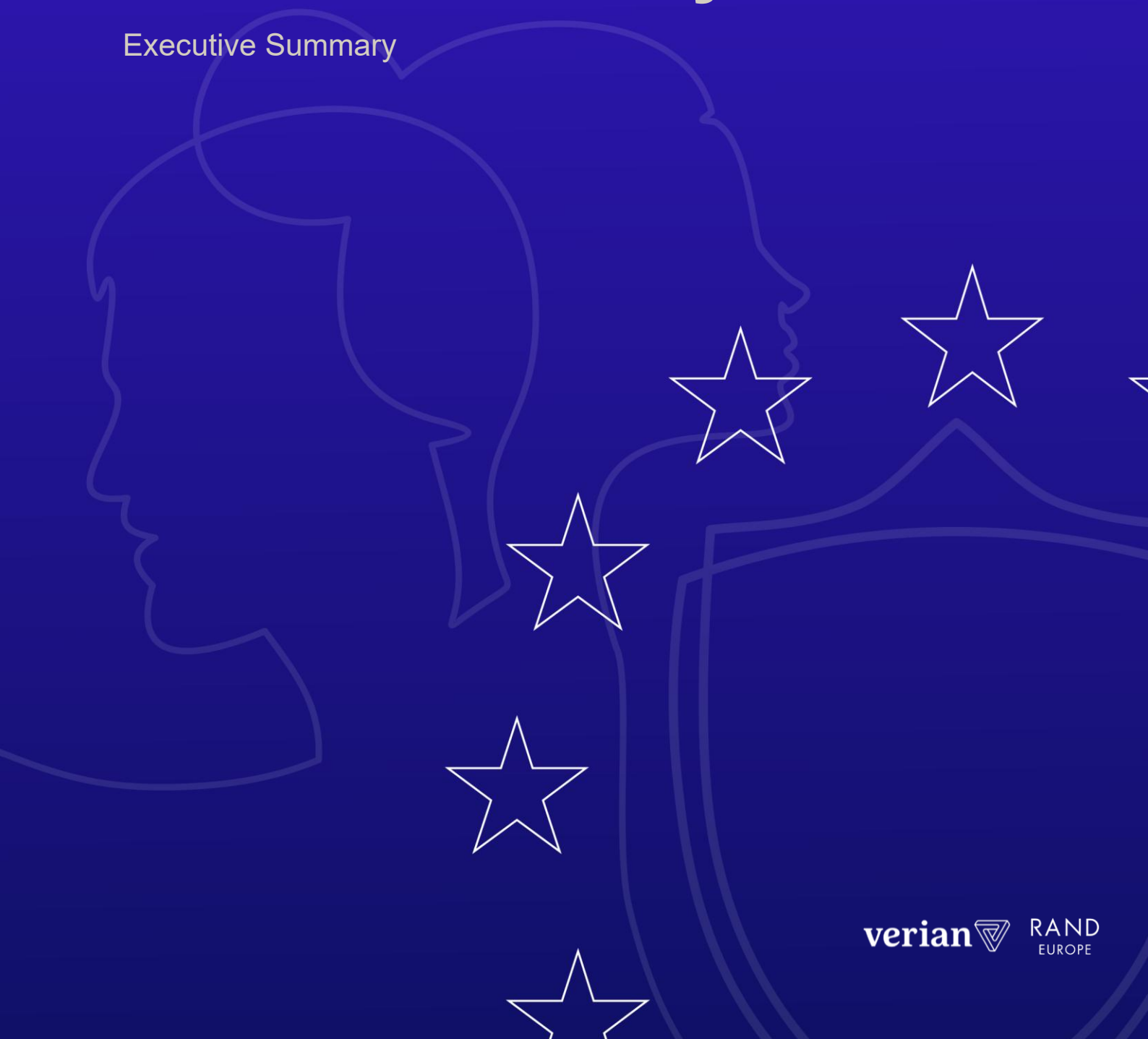
European Commission

# Study on the Attractiveness of the Defence Industry

Executive Summary



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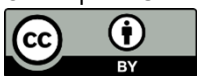

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# Executive summary

The European defence industry is experiencing renewed momentum in response to geopolitical developments and the European Union (EU)'s efforts to strengthen its Defence Technological and Industrial Base (EDTIB). **A skilled workforce is a key enabler of this transformation**. However, previous studies and discussions with defence industry experts have shown that **the defence industry does not appear as attractive as other industrial sectors**, especially among young people. This raises the concern that perceptions of the sector may **affect its ability to recruit the talent it needs**.

To support a better understanding of these issues, the European Commission, through DG DEFIS, commissioned a study led by a consortium of Novaspace, RAND Europe, and Verian to provide a **better and more comprehensive understanding of the perceptions towards the defence industry** through two surveys and a series of workshops.

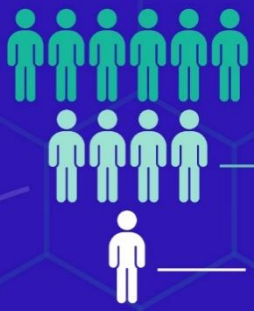
Two **surveys** gathered responses from over **3,300 students, young professionals,** and **current or former defence employees**. The results showed that younger respondents seemed to value work that they consider meaningful, as well as career development, work–life balance, and diversity. While many expressed a general interest in contributing to European security, it seemed that relatively few had a clear understanding of career opportunities in the defence industry. For professionals, motivators to work in the defence industry included work being seen as mission-driven and dealing with advanced technology, while perceived challenges included perceptions of inflexibility and slow innovation in parts of the sector.

The **workshops**, held in April and June 2025, **explored these themes in more depth**. The **first workshop** gathered **students and early-career professionals**. They expressed interest in public service and European security but cited recruitment opacity, limited awareness of non-technical roles, and ethical concerns as deterrents. The **second workshop** focused on **defence professionals.** They appreciated the mission-driven nature of their work but noted frustration with inflexible institutions and slow innovation. The **third** brought together **Human Resources (HR) representatives involved in recruitment and retention** to discuss practical solutions. While these discussions provided useful perspectives, it should be noted that the composition of participants was not fully representative of the broader workforce or student population.

Taken together, the insights suggest that **interest in defence careers exists but is not consistently translating into recruitment**. Limited visibility, unclear entry pathways, and perceptions of rigid employment conditions appear to be important factors, especially for underrepresented groups and professionals seeking to move across borders or roles. The results suggest **increasing the sector's visibility more broadly, improving its career entry and development opportunities, and enhancing its employment conditions**, whether in industry, academia, or at the institutional level. Recruitment processes should be made more transparent and accessible. Skills certifications recognised across MS could help boost mobility and support diverse career paths. Where security conditions allow, more flexible and hybrid working arrangements should be encouraged. Ultimately, these actions can contribute to the positioning of the European defence sector as an attractive and future-ready employer, aligned with the expectations of the next generation.

# Study on the Attractiveness of the Defence Industry
## Key insights

**The defence sector** shows **moderate** to **high latent attractiveness**, but there is an **"interest–action gap"**.

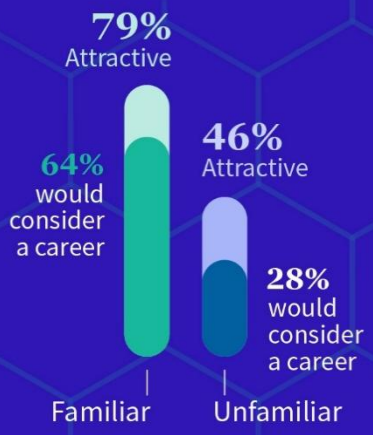


**58%** find a defence career attractive

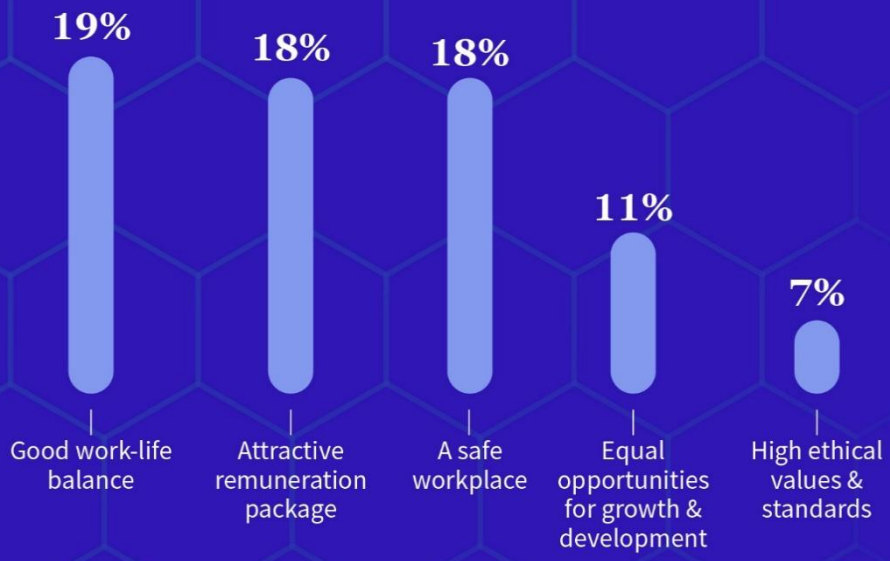
**42%** had previously considered pursuing it

**6%** of those actively job-seeking show active intent to pursue a role

**Awareness of the defence industry** and of the **career opportunities** it offers proved to be a **critical factor.**




**Top job attributes** for students and young professionals: **work-life balance, a safe workplace, attractive remuneration.** (% of total survey respondents)




**Current employees** report **positive experiences** within the sector. The perceptions from outside lag behind.

**86%** of current employees are satisfied

**92%** rate task complexity highly

**78%** agree the sector offers good work–life balance

**92%** rate contribution to national/EU security highly

The study revealed a convergence around **three key areas**

**Visibility (7 activities)**

**Career entry & development (11 activities)**

**Employment conditions (5 activities)**

*Source: survey, current defence industry workers: N = 581, all students and young professionals: N = 2626*

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