

Determinants Influencing the Development of the Defense Industry under the Conditions of the European Defense Industry Program

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Abstract

The paper examines the economic and institutional determinants of the defense industry in the transformed security environment, emphasizing the sector's importance for national defense. It assesses the implementation of the European Union (EU) Defense Industry Program in the wake of Russia's invasion of Ukraine, focusing on implementation challenges, the role of multinational firms, and issues surrounding dual-use technologies. The research question asks which economic determinants influence program implementation and contribute to the EU's economic and political security. The Program's establishment within the EU's first defense industry strategy marks a pivotal milestone for enhancing preparedness and the competitiveness of Europe's defense technology and industrial base. Methodologically, the study combines qualitative and quantitative approaches.

KEY WORDS: *defense industry, new security conditions, national security, EU's Defense Technological and Industrial Base, dual use, European defense market, European defense industrial strategy, Implementation of the European Defense Industry Program*

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1. Introduction

In a world shaped by geopolitical rivalry, technological advancements, and fiscal pressures, it is essential to leverage every potential approach to enhance national security. This underscores the growing interest in and importance of dual-use technologies, innovations such as drones and artificial intelligence that serve both civilian and military applications. These technologies may originate from diverse sectors; however, their true value is realized only when they are adapted and scaled across both arenas. Dual-use technologies amalgamate the breadth and agility of commercial innovations with the strategic significance of defense technologies. While this concept is not new and has evolved over time, its importance has reached a critical juncture. The modern battlefield, both physical and digital, is now equally influenced by commercial communication methods, sensors, data platforms, and artificial intelligence as it is by traditional weapon systems.

National economies must respond to global changes, encompassing financial aspects, climate change, armed conflicts, migration waves, economic cycles, and more. The European Union aims to maintain a competitive edge within a globalized world. Numerous analyses describe global trends in defense industry transformation and adaptation. Most reports addressing the defense sector since 2008 [1], particularly after 2024 [2], indicate a pressing need for the restructuring of the defense industry and defense policies.

This restructuring should involve identifying critical technologies and national security capabilities, establishing an acquisition agency to centralize and improve procurement processes, and eliminating the undervaluation of the defense sector in relation to other industries. The war in Ukraine has bolstered the defense industry, particularly as the business, once viewed critically by governments and society, has become essential following Russia's invasion. This ongoing conflict

has altered both governmental and societal attitudes toward armament, yielding benefits for both companies and governments.

The European Union and its member states' preparedness strategy aims to protect citizens' security, territorial integrity, infrastructure, and fundamental democratic values and processes. This necessitates investing in essential related capabilities and technologies. [3] The EU's preparedness strategy is leading to the establishment of a European defense industrial program. This program contributes not only to the security of the EU but also to economic strengthening in a global context.

2. Current Status of the Research Topic

State security is primarily an economic, organizational, and political matter involving all sectors. The defense industry is one of the largest industrial sectors in the world. It is a strategic sector that shapes armament policy and produces items vital for national defense as well as for the defense of the EU. The ultimate output of defense manufacturing is final military production. In a narrower sense, final military production comprises military equipment, particularly weapons and their systems, means for conducting armed operations, for example communications systems, military infrastructure, various auxiliary devices, and the materials required for the operation and maintenance of military equipment, such as spare parts, fuels, and lubricants.

The twenty-first century is a period of significant change in the defense industry at both the macroeconomic and microeconomic levels [4]. Contributing to this shift is the European Defense Industry Program (EDIP), including measures to ensure the timely availability and delivery of defense products, effective from 2025 until the end of 2027. The program provides grants totaling 1.5 billion euros for 2025 to 2027, of which 300 million euros are designated as a special support instrument for Ukraine [5]. The European Defense Industrial Strategy (EDIS), developed in response to prolonged geopolitical instability and the resulting critical needs, focuses on actively strengthening the EU's defense preparedness. The European Parliament adopted the first Program for the European Defense Industry on 25th November 2025. This legislation aims to reinforce the EU defense industry, support joint European public procurement, increase defense production, and intensify assistance to Ukraine. The security and economic situation have deteriorated, primarily due to Russia's aggressive policies. Great power interests of other states also threaten EU security and affect the stability of hydrocarbon fuel prices and supplies of critical mineral resources.

The European Commission has taken new export-control powers to prevent Russia's access to advanced technologies. Departing from decades-long practice, the European Commission restricted EU exports of dual-use goods with both civilian and military applications, including quantum computers and semiconductor manufacturing equipment, under Regulation (EU) 2021/821 establishing the Union regime for export, transfer, brokering, technical assistance, and transit of dual-use items [6]. The European Commission said that EU-level unified controls ensure effectiveness and transparency while preserving the Union's competitiveness and a level playing field for economic operators.

Until now the EU relied on multilateral agreements to list dual-use goods for control, but the Wassenaar Arrangement includes Russia, which blocked listing items it could use in the war in Ukraine. The sector is now guided by the 2024 New Strategy for the European Defense Industry and the 2024 proposal establishing the European Defense Industry Program and measures to ensure timely availability and delivery of defense products (EDIP). Key documents include the Strategic Compass for Security and Defense, 2022; Reinforcing Europe's Defense Industry, 2024; and Financing the European Defense Industry, 2024. Despite many documents, detailed economic impact analyses of defense-industry development are lacking; one exception is the study "Patents and Dual-use Technology: An Empirical Study of the World's Largest Defense Companies" by Acosta et al. (2018) [7].

3. Data and Methods

The lack of standardized cross-country and EU-wide time series data on arms production presents a significant challenge to understanding the development of the European defense industry and the implementation of the European Defense Industry Program (EDIP). This study employs a comparative analytical approach to identify key determinants influencing the defense sector within the evolving security environment. By integrating both qualitative and quantitative methodologies, the research aims to bridge the gap in existing data while capturing varied dimensions of the defense industry's dynamics.

The quantitative analysis draws from existing datasets on defense production and economic indicators to assess trends in the arms industry across EU member states. Complementing this, qualitative insights are gathered through interviews and case studies involving industry experts and policymakers, which help elucidate the institutional contexts that shape decision-making processes in defense procurement and technology development. This comprehensive framework allows for a nuanced understanding of factors such as dual-use technologies, collaboration between civilian and military sectors, and export control regulations, thereby informing policy recommendations for enhancing the European defense landscape.

4. Results and Discussion

Based on an analysis of European defense preparedness strategies and related policy documents, it is concluded that the defense industry must be positioned as a bridge between domestic economic and social objectives and external strategic and political goals to preserve economic activity and prevent the idling of capital and labor. It is argued that a competitive and adequately resourced defense sector can support GDP growth, sustain employment, generate public revenues, and contribute to foreign trade and the balance of payments, thereby promoting economic welfare and underpinning security capabilities. It is further reported that national and collective security are undermined by inadequate competitiveness, insufficient investment, fragmentation of the defense market, and constrained access to financing for defense firms [8].

The significance attributed to the strategy of defense readiness is, according to the authors, a result of the quantitative contribution to both macroeconomic and microeconomic factors of the economy. This strategy creates opportunities for technical, engineering, and scientific workforce through dual use. It is also worth noting that domestic demand for arms, which tends to be greater than fluctuations in other sectors, thus aids economic stabilization. To address challenges in defense readiness, the concept of dual use can be employed. A key theme has emerged regarding how civilian economic sectors can benefit from military knowledge embedded in military patents. Interest in this topic primarily stems from the opportunity to gain additional revenues beyond those that are strictly military. The advantage of these additional revenues is becoming a strategically important factor in countries where the defense industry plays a significant role [9].

4.1 Dual Use Production

Dual-use goods are defined as items that can serve both civilian and military purposes, encompassing products, technologies, and software. Common examples include machine tools, testing and measuring instruments, valves, and electronic components. The primary legal framework for regulating dual-use goods in the European Union is Regulation (EU) 2021/821 of May 20, 2021 (the EU Dual-Use Regulation), which governs export control and licensing requirements [10]. The use of military technologies for civilian purposes is a key component of the European Defense Industry Program and is increasingly important.

Dual use is viewed as an opportunity for broader application of research and manufacturing efforts while achieving military and civilian objectives. By-products highlight the influence of military technology on the civilian sector, with many military-origin products adapting for civilian use. This concept can also encompass technological capabilities and know-how. The dual relationship evolves in these three ways:

- New technology yields substantial gains from economies of scale and diverse approaches to understanding it.
- Benefits of technology typically emerge during its life cycle.
- Greater technological diversity enhances the potential for creating new opportunities.

Dual use typically leads to a reduction in fixed costs, as these costs are spread across multiple units, resulting from economies of scale. Continuous production saves costs associated with closing and reopening production lines. Producing larger quantities does not reduce fixed costs but allows these costs to be distributed among more customers, thereby lowering the burden for each.

Technically, the reduced unit price for local customers can be expressed in two ways: by allocating fixed costs to units sold domestically and abroad, thereby preemptively lowering prices for local customers, or alternatively, by charging the local customer the full price of fixed costs upfront and later compensating them after exporting goods. The latter method is often used for Research and Development (R&D), which involves expenses related to creating new products or services. These R&D expenses are categorized as operational costs incurred in the search and development of innovations.

Economies of scale are a function of production volume over time. A larger output within a given period allows cost savings using specialized machinery and better-planned division of labor. Skill acquisition is a function of cumulative production; workers develop skills and discover more efficient methods during initial production periods, leading to cost savings in subsequent periods. In both cases, the total amount of production is important, but its distribution over time has opposing effects. While concentrating production in a shorter period requires more workers and can lead to greater economies of scale, spreading the same production volume over a longer period requires fewer workers and allows for the benefits of skill acquisition.

Export orders can offset fluctuations in budget and local demand, helping maintain stable production value. Predictable production over long periods allows companies to optimize labor and material purchasing, leading to cost savings. Additionally, export orders can extend production periods, keeping lines active after local orders are fulfilled. When local customers are eager for developed weapons, manufacturing facilities may face idle periods if they await new demands. Defense exports can fill gaps between local orders, saving costs associated with production line shutdowns. Greater microeconomic benefits are seen in exports of technologically advanced weapon systems, where fixed R&D costs are significant compared to variable production costs. The timing of production for local and export markets also affects

savings. Traditional theory explains international trade through comparative advantages arising from differences in production technologies and local conditions.

Arms transfers can have complex implications for supplier security, exhibiting both positive short-term effects and potentially negative long-term consequences. In the short term, a country receiving arms may experience enhanced security and deterrence capabilities, bolstering its immediate defense posture against external threats. This can lead to a more stable environment for the recipient country, enabling it to deter aggression from potential adversaries and thus contribute to a sense of national security. Additionally, the infusion of advanced weapon systems can stimulate defense industry growth within the recipient nation, creating jobs and fostering technological innovation. However, these short-sighted arms deliveries may lead to detrimental outcomes over time. For instance, reliance on foreign military supplies can create vulnerabilities in the recipient nation's defense structure, making it dependent on external partners for crucial military capabilities. This dependence can hinder strategic autonomy and complicate decision-making during crises. Furthermore, such transfers may fuel regional tensions, potentially escalating arms races as neighboring countries respond by enhancing their own military capabilities, leading to an arms buildup that destabilizes the security dynamics of the region.

While arms transfers can enhance short-term security for recipient nations, they highlight the pressing need to address vulnerabilities within the supply chains of dual-use technologies critical to defense. European strategic independence in technology heavily relies on these dual-use applications, which encompass advanced materials such as Li-ion batteries, fuel cells, robotics, and unmanned vehicles. A recent report reiterated the major reliance of Europe on non-EU suppliers, particularly China, posing significant risks to both strategic autonomy and security. This dependence can lead to vulnerabilities that compromise national defense strategies, as disruptions in supply chains may hinder the availability of essential components during crises. Consequently, it is paramount for European nations to diversify their sources and strengthen domestic production capabilities. By fostering strategic alliances and encouraging investments in dual-use technologies, Europe can enhance its defense sector's resilience and technological innovation while promoting collaboration between civil and military sectors. Addressing these supply risks is crucial not only for safeguarding national security but also for stimulating economic growth within the region. For instance, the risk associated with raw materials reflects a moderate level of concern regarding supply vulnerabilities, emphasizing the need to strengthen supply chains and secure critical materials through diversification and increased European production capabilities (see Fig. 1 with color-coded levels of risk).

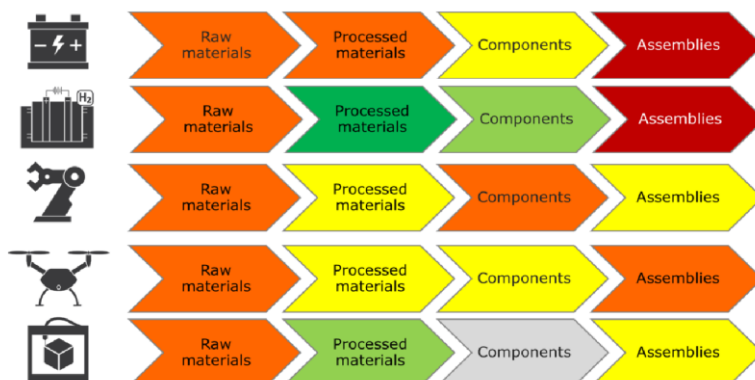


Fig.1. Supply risks for Europe in the supply chains of Li-ion batteries, fuel cells, robotics, drones and 3D printing
Source: European Commission (RMIS) [15]

Consequently, arms deliveries from exporters who only focus on immediate gains may differ significantly from those who anticipate and plan for future implications, including geopolitical shifts and evolving security landscapes. Exporters that adopt a long-term perspective understand that their actions have ramifications that extend well beyond the financial aspects of individual deals. They recognize that arms transfers are not merely transactions, but significant events that can shape the strategic environment. Such exporters consider how their sales might influence regional power dynamics, possibly altering the balance of military power and provoking reactions from neighboring countries. Moreover, these exporters assess how their actions align with international norms and agreements, acknowledging that irresponsible arms transfers can lead to violations of human rights or exacerbate existing conflicts. This foresight allows them to engage in diplomatic dialogues, fostering trust and collaboration between nations.

In contrast, short-sighted arms sales that prioritize immediate profit can create detrimental cycles of instability. These decisions often spur arms races as countries respond to perceived threats by accelerating their own military capabilities. Such escalation undermines regional security efforts and complicates diplomatic relations, ultimately hindering progress toward disarmament and cooperative security initiatives. The resulting volatility can create environments ripe for conflict, where the pursuit of short-term gains by certain exporters leads to long-term strategic dilemmas for the international community. By promoting responsible arms transfers and fostering an awareness of the interconnectedness of security issues, exporters can play a crucial role in cultivating a more stable and peaceful global landscape.

4.2 Export Control Regime

The export control regime for dual-use goods and technologies operates under the Common Trade Policy of the EU in accordance with Council Regulation (EC) No. 428/2009. This regulation establishes the Community regime for the control of the export, transit, brokering, and transfer of dual-use goods, which is binding and directly applicable in all EU member states. The regulation replaced Council Regulation No. 1334/2000, effective from the year 2000. It includes a list of dual-use goods based on international control regimes, which is updated annually in line with commitments made by member states as part of non-proliferation agreements and export control treaties. A 2026 EU study concluded that while the legal framework under Regulation 2021/821 is largely sufficient for controlling listed items, controls on unlisted items destined for conflict-affected regions may be inadequate to meet international humanitarian law requirements [11].

The EU controls the export of dual-use goods and technologies that can be used for both civilian and military purposes. This is based on international commitments to combat the proliferation of goods with potential military applications. Entities planning to export these goods must obtain the necessary permits, and these controls are enforced at the member state level. Dual-use issues are addressed through collaborative procurement of drones under the European Defence Industry Reinforcement through Common Procurement Act (EDIRPA) via coordinated calls [12]. These calls combine EU fund-based financial instruments with loans from the European Investment Bank. In 2026, an EU-based network of centers for testing civil defense drones is to be established, along with increased funding for production lines suitable for emergency situations [13], [14].

Fig.2 summarizes the ten categories of items in the EU Control List and the number of entries per category. For instance, the largest category, “Special materials and related equipment” (507 entries), covers a wide range of advanced materials and associated technologies used in industrial, scientific and military applications, reflecting its broad scope and technological importance.

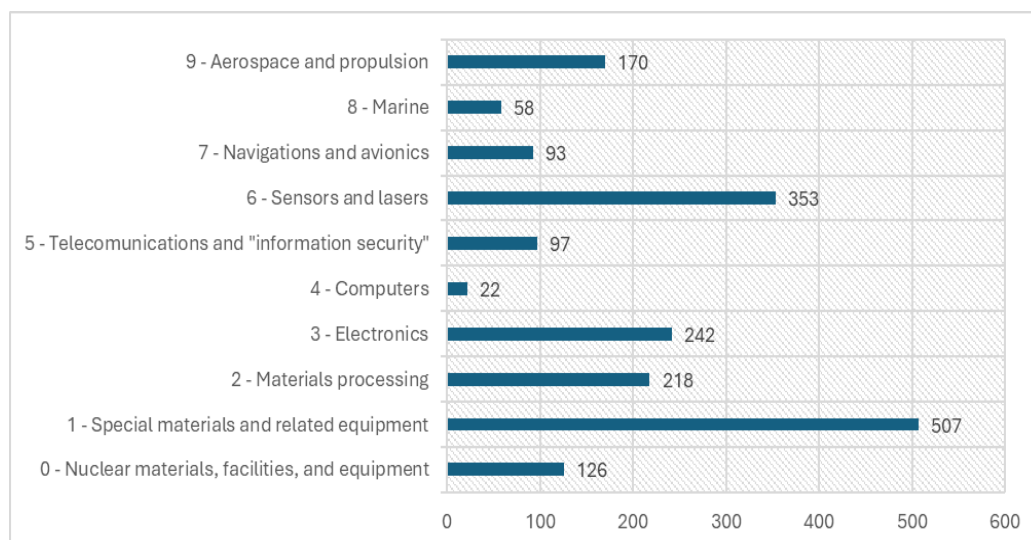


Fig.2. Number of dual-use items listed in the 10 categories of Annex I to the Regulation (EU) 2021/821 (authors' processing) Source of data: European Commission, 2023 [16]

The importance of the export control regime extends beyond compliance and regulatory frameworks; it plays a vital role in ensuring that dual-use technologies are transferred responsibly and effectively. The EU's commitment to responsible export practices aligns with its broader objectives of promoting peace, stability, and security within and beyond its borders. In this context, the EU actively engages in international cooperation efforts, working with other countries and organizations to harmonize export control measures and address the challenges posed by emerging technologies.

5. Conclusions

Implementing the European Union's defense industry program under new security conditions positively impacts areas affecting the defense industry, addresses the challenges of implementing the European defense program, and creates a framework for dual-use technologies.

There are four reasons why EU countries should focus on dual-use technologies:

- I. Cost-effectiveness. Joint development and repurpose of civilian technologies for military use can prevent duplicate investments for the EU.
- II. Time advantage. Adopting commercially advanced solutions accelerates their implementation in defense.

- III. Access to cutting-edge innovations. Research and development in the private sector, particularly in artificial intelligence, robotics, quantum computing, and cybersecurity, is often more dynamic and efficient than defense R&D programs.
- IV. Resilience and sovereignty. Integrating the civilian and military sectors strengthens domestic industrial bases, reduces dependency on foreign sources, enhances national preparedness, and contributes to soft power through the export of defense technologies.

What strategic recommendations can be made for dual use? Analysis indicates that proven practices are essential for managing dual-use programs. First, selecting the appropriate market-oriented model, state-coordinated, or state-directed is crucial. The chosen model should be evidence-based and evolve with the country's economic and strategic development.

The two key aspects to consider are:

- I. The maturity of the civilian/private innovation economy. Does the country have a dynamic private sector base in R&D, a thriving startup ecosystem, and an innovative culture?
- II. Defense as a national priority. Is national security the highest priority, leading to significant public investment and a focus on policy and talent allocation?

The choice of model is not static; as the private sector matures or defense needs change, countries should reassess or adjust their approaches. For example, a country with an emerging startup ecosystem may shift from a state-led model to a state-coordinated one. Regardless of the model chosen, a proven set of initiatives can deliver consistently positive outcomes. Recommended initiatives include:

- a. Dual-use strategy: developing a clear and phased plan for dual-use technology growth based on a comprehensive national audit of domestic capacities, encompassing industrial, intellectual, economic, and political dimensions.
- b. Innovation challenges: supporting startups to provide commercial solutions for defense issues.
- c. Defense-focused accelerators and incubators: integrating civilian technology teams with defense efforts.
- d. Agile procurement channels: facilitating the rapid integration of commercial solutions into the defense system.

The use of dual-use technologies benefits both the military and civilian sectors. From a business perspective, companies' technological characteristics and skills enhance defense security. Macroeconomically, a country's legal framework, manufacturing structure, and industrial traditions also influence the presence of dual-use technologies, all of which should be considered. Moving forward, it is essential to prioritize support for security and defense research and development in dual-use applications, enabling simultaneous benefits for both defense and general use.

The priority is not to condemn national procurement instincts but to steadily develop a competitive European defense market beneath the national level while preserving transatlantic cooperation. Europe must offer an attractive, qualitatively superior alternative in equipment and a coherent defense identity; EDIP provides the policy and investment framework to align procurement, speed up capability delivery, and sustain cooperation in defense production beyond 2027.

The European defense industry has recently experienced rapid growth in exports, investment and firm value, driven by the war in Ukraine, shifts in EU security policy and a wave of defense-oriented startups. Despite capacity and personnel constraints, evidence and expert judgment point to its rising strategic importance for the Union. By promoting joint investments, European-centered procurement and deeper integration with Ukrainian capabilities, EDIP can strengthen common defense systems, enhance resilience and reduce long-standing external dependencies that have threatened European security.

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