

FOR CLIMATE PROTECTION, INNOVATION AND SECURITY.
KEEPING PEOPLE CONNECTED.

AEROSPACE “MADE IN GERMANY”



Around the world, nations that want to be leaders in the high-tech sector are investing in the aerospace industry. Like no other this industry stands for innovation and advanced technology. Our industrial policy and technology promotion must be increasingly geared to keeping Germany competitive worldwide while at the same time preserving its national sovereignty.

Our **CIVIL AVIATION INDUSTRY** accounts for a substantial share of global aircraft production: every aircraft manufactured contains components “Made in Germany.” Every sixth aircraft in the world comes from Germany.

Our **MILITARY AVIATION INDUSTRY** is vital for Germany as a center of technological innovation and for the security of the federal republic. With its contribution to equipping the armed forces and civil security agencies, it is a driving force for sustainable living and economic activity. The military portfolio is a strategic instrument for the federal republic of Germany to co-develop future-oriented high-tech joint programs as an equal partner and thus to help shape Europe’s industrial policy in the future.

In our **SPACE INDUSTRY**, investments pay off several times over: each euro spent creates a fourfold direct and ninefold indirect added value effect. Continuing to ambitiously advance this sector is pivotal for Germany to remain a leader in this key technology in the future.

More than half of the over 200 predominantly medium-sized companies in the German aerospace industry are active in both the civil and military sectors. They employ more than 100,000 people, generate a value added of over €40 billion and have an export share of well over 75%. The research ratio is almost 10%.

We need planning certainty. With its high-spec industrial workplaces and unique high-tech competencies, the German aviation industry holds a key position in the national economy. Even if the coronavirus pandemic has caused a serious crisis here, this is certain: the German aerospace industry is not only among the long-term growth and technology sectors – it also has the potential to ensure air transport worldwide in the future and is fully committed to doing so. It will be their task to play a leading role in the establishment of climate-neutral air transport.



This requires an aviation policy that lays the foundations for the German **aviation industry** to become the technology leader in next-generation climate-neutral aircraft.

Recommended measures:

- 1. SUPPORT FOR THE AVIATION INDUSTRY TO OVERCOME THE CORONAVIRUS CRISIS**
 - Establish supportive measures for the civil aviation industry, in particular short-time work, in line with the duration of the coronavirus crisis
- 2. SUPPORT NEW CONCEPTS FOR NEXT-GENERATION CLIMATE-NEUTRAL AIRCRAFT**
 - Foster aviation research with a focus on climate-neutral flying
 - Organize and budget for a suitable technology demonstrator program that is compliant with WTO and EU subsidy rules
- 3. ESTABLISH THE SUPPLY OF SUSTAINABLE AVIATION FUEL**
 - Quickly implement the *power-to-liquid road map*
- 4. ACCELERATED MODERNIZATION OF AIRCRAFT FLEETS**
 - Establish an innovation premium for aviation

5. EXPANDING GERMANY'S LEADING POSITION IN AIR TAXIS

- Accelerate infrastructure development and appropriate air traffic management (UTM) as well as planning and approval procedures



@Bildstelle Taktisches Luftwaffengeschwader 73 „Steinhof“

Germany's successful and innovative **military aviation industry** has strategic importance. It requires an industrial and procurement policy for the development of technologies that both strengthen Germany's and Europe's sovereignty and enable technologies for subsequent applications in the civilian sector.

Recommended measures:

1. DEFINE, EXPAND AND SPECIFICALLY PROMOTE KEY TECHNOLOGIES

- Increase political commitment to developing key technologies
- Define rotary- and fixed-wing aircraft (manned and unmanned) as a European key technology with an indispensable national foundation
- Classify the field of armament/effector systems as a national key technology for military aviation
- Create an explicit distinction between Europe and the world market in key enabling technologies

2. DRIVING COOPERATIVE PROJECTS WITH POLITICAL VISION

- Develop and advocate for a holistic national industrial policy vision
- Back up the programs with financial and human resources
- Support cooperative programs with export arrangements such as bilateral export control agreements

- Harmonize European export standards at the national level
- Create instruments to facilitate export at the government level, analogous to Foreign Military Sales

3. BUDGET FUNDS: ENSURE FINANCIAL PLANNING CERTAINTY

- Establish a solid and sustainably funded defense budget, taking into account a Defense Planning Act
- Increase the budget for research and development in Individual Plan 14

4. INTENSIFY COOPERATION WITH THE GERMAN ARMED FORCES

- Expand cooperation between industry and the Bundeswehr in terms of logistical support and personnel models

©ESA



Germany's successful and innovative **space industry** requires political activity that provides a sustainable foundation for the sector to remain competitive internationally.

Recommended measures:

1. SPACE TECHNOLOGY FOR ENVIRONMENTAL AND CLIMATE PROTECTION AND FOR THE CONSERVATION OF RESOURCES

- Create new climate and environment missions at the national and European level (ESA + EU)
- Promote leadership roles by the German space industry

2. SPACE TECHNOLOGY AS A KEY CAPABILITY FOR NATIONAL AND EUROPEAN SOVEREIGNTY

- Expand and strengthen the key capabilities of the German space industry in the defense and security sector to reinforce national sovereignty, protect our space infrastructure and safeguard the wide range of space applications and sovereign and independent access to space
- Anchor spaceflight as one of the main pillars of national and European defense/security strategy and architecture

3. SECURITY AND ENVIRONMENTAL PROTECTION IN SPACE AND NEW SERVICES

- Establish European and, subsequently, global space traffic management as well as measures to prevent and eliminate space debris
- Enhance national capabilities to observe the situation in space, including space weather observation, and to safely operate space infrastructure

4. CLEAR POLITICAL COMMITMENT FROM GERMANY TO TAKE AN ACTIVE LEADERSHIP ROLE IN EU SPACE PROGRAMS

- Strengthen the German role in EU space programs through support for the development of a new flagship program

5. A LEADING GERMAN ROLE AT THE NEXT ESA COUNCIL MEETING AT MINISTERIAL LEVEL, 2022+

- Strategically expand the German leadership role at the next ESA Council meeting at ministerial level with early involvement of the German space industry
- Strengthen the German contribution to the ESA budget at the 2022 ESA Council meeting at ministerial level

6. APPROPRIATE FUNDING OF THE SPACE SECTOR IN GERMANY TO MEET CURRENT AND FUTURE ENVIRONMENTAL, TRANSPORT, SECURITY AND INDUSTRIAL-POLICY RELATED CHALLENGES

- Increase the national program to €500 million per year initially in order to gradually reach the level of European competitors such as France and Italy

7. INDUSTRY-FRIENDLY REGULATIONS AND STANDARDS THAT ENABLE GERMANY TO REMAIN COMPETITIVE

- Establish a European legal framework for the space sector
- Ensure a level playing field for research institutes and industry

8. A NEW OSACE STRATEGY 2021

- Redraft the German Space Strategy 2021+ to take account of new developments – especially regarding new space (commercialization of space travel)

In order to bring together these issues from the national, European and international aerospace industry in the federal government in an optimal and effective way, we need more than ever a

FEDERAL GOVERNMENT COORDINATOR OF GERMAN AEROSPACE POLICY.

Further strengthening this position will help our country to join Germany's strengths across sectors with regard to European and international bodies and to give them adequate weight in the future.



**German Aerospace Industries
Association (BDLI)**

Phone: +49 (0)30 206140-0

kontakt@bdli.de

www.bdli.de

March 2021



www.bdli.de

