

ENSURING SOVEREIGNTY AND COMPETITIVENESS

Proposals from the military aviation industry for implementation in the upcoming legislative period

MILITARY AVIATION “MADE IN GERMANY” – ENSURING SOVEREIGNTY AND COMPETITIVENESS



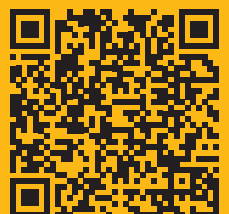
@Bildstelle Taktisches Luftwaffengeschwader 73 „Steinhoff“

**BDLI**

German Aerospace Industries Association



Learn more:



## MILITARY AVIATION “MADE IN GERMANY” – ENSURING SOVEREIGNTY AND COMPETITIVENESS

**Germany’s successful and innovative military aviation industry has strategic importance. It requires an industrial and procurement policy that allows the development of technologies that not only strengthen Germany’s and Europe’s sovereignty but are also useful in the civilian sector.**

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. This military section of our industry is vital not only for Germany’s role as a center for technological innovation but also for the security of the federal republic. We equip the armed forces in the best possible way so that soldiers can rely on our products and services to meet the highest requirements in the field. To this end, our highly qualified employees develop high-tech solutions at a first-class level. To maintain this standard in the future, we need support.

**We are dependent on the involvement of politicians.** This involvement begins with the recognition of the system-relevance of our industry that promotes sustainable living and economic activity by ensuring the prerequisites for it. We therefore expect clear support against our exclusion from funding opportunities regarding *environmental, societal and governance* initiatives<sup>1</sup>.

**Our military portfolio is a strategic instrument of the federal republic.** Our technological capabilities make us an attractive equal partner for cooperation, lending an important contribution to Europe’s future industrial policy with joint high-tech programs. In order to maintain this status and secure it for the future, we need continuous, long-term and targeted strengthening of the aerospace industry, especially in the military sector.

### Recommended measures:

#### 1. DEFINE, EXPAND AND SPECIFICALLY PROMOTE KEY TECHNOLOGIES

**The federal government has not lived up to its own claim.** It has declared its intention to give special support and protection to key technologies whose availability “must be ensured for essential national security reasons.”<sup>2</sup> That hasn’t happened. Programs that clearly concern national key technologies are put out to tender throughout Europe, although essential strategic development capacities must be kept in Germany. Accordingly, European key technology projects need intensive political support in global competition.

**The key technology portfolio does not reflect political realities.** This applies to the classification of rotary- and fixed-wing aircraft as technologies to be covered globally and to armament in airspace.

<sup>1</sup> See BDI-BDSV-BDLI: Industry essentials for the 2021 elections to the Bundestag

<sup>2</sup> Policy paper of the federal government for strengthening the security and defense industry (2020), p. 3.3

**Rotary- and fixed-wing aircraft must be defined as key European technologies with an indispensable national foundation.** European countries are investing heavily in the development of programs (FCAS<sup>3</sup>, ENGR<sup>4</sup>) that are deliberately aimed at strengthening European sovereignty. Germany plays a leading role in this. This national component is essential for continuing to cooperate at equal levels and must be protected and promoted in the same way as other national key technologies. At the same time, it must be taken into account that aircraft are no longer necessarily manned (see, for example, the Eurodrone<sup>5</sup> and mobility concepts of the future<sup>6</sup>).

**The area of armament in flight operations is not sufficiently covered.** In view of the fact that this is a highly sensitive core area of the state's monopoly on the use of force, this circumstance is not tenable. The conflicts of the last few years reveal the acute military necessity of weapon concepts appropriate to the threat. A national competence in this core area is essential so that Germany can maintain its own capacities for the evaluation and development of effector technologies. This ability is also a basic prerequisite for being able to adapt systems available on the market to the needs of the German customer.

#### WHAT IS NECESSARY?

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

## 2. DRIVING COOPERATIVE PROJECTS WITH POLITICAL VISION

**Large-scale technological projects can no longer be carried out on a purely national basis.** Cooperative projects offer numerous opportunities to strengthen the technological foundation of the partners, to generate positive effects on other areas of cooperation and to leverage synergy effects. On the basis of a clear portfolio of national key technologies, supported by industrial policy, Germany can enter into strong partnerships and claim a leading role in the European network and on the global market.

**European cooperative projects strengthen Europe's industrial and technological sovereignty.** Germany must develop an ambitious vision of industrial policy and represent it vis-à-vis its partners to strategically and consistently advance such programs for the benefit of national and European key technologies. However, this also means that the federal government must make a clear political and financial commitment to these programs.

<sup>3</sup> Future Combat Air System

<sup>4</sup> European Next Generation Rotorcraft

<sup>5</sup> European Medium Altitude Long Endurance Remotely Piloted Aircraft System MALE RPAS

<sup>6</sup> E.g., in the context of regional/urban air mobility

**Multinational cooperative projects offer the possibility of further developing the level of integration and interoperability of the armed forces.** Outside the European pillar of NATO, this can meet needs for which the national or European market alone is not sufficient in the short term.

**Both areas of cooperation are crucial for the technological, industrial and security policy-related role of the federal republic.** Accordingly, they must be promoted and supported. Necessary budgetary resources must be made available.

**Germany must reinforce its status as a reliable export partner.** Otherwise, Germany will no longer be considered as a cooperation partner, which will have serious consequences for German industry and the international reputation of the federal republic. Germany would also benefit from treaty instruments by means of which bilateral cooperation at the government level (G2G)<sup>7</sup> can be proactively offered in both the defense and security sectors<sup>8</sup>.

#### WHAT IS NECESSARY?

- Development of and advocacy for a holistic national industrial policy vision
- Backing up the programs with financial and human resources<sup>9</sup>
- Support for cooperative programs with export arrangements such as bilateral export control agreements<sup>10</sup>.
- Harmonization of European export standards at the national level
- Instruments to facilitate export at the government level, analogous to FMS<sup>11</sup>

### 3. ENSURE FINANCIAL PLANNING CERTAINTY

**Our industry produces advanced technology.** Accordingly, our companies invest in research and development, in the qualification of their employees and in highly complex plants. This high investment requirement presupposes financial planning certainty. That is why we support the idea of a longer duration for selected armament projects. It must not undermine Parliament's control, but should provide certainty for long-term strategic projects.

**Military technology programs are increasingly influencing the civilian sector.** With research in the field of artificial intelligence, human-machine collaboration and the integration of unmanned aircraft into civil airspace, programs such as FCAS and ENGR are having an increasingly significant impact on civil industries – far beyond aviation (spillover). By investing in trusted European data communication structures such as GAIA-X, they also make a significant contribution to European data sovereignty. Defense spending strengthens the economic and strategic position of Germany and Europe.

<sup>7</sup> *Government to Government*

<sup>8</sup> This would involve both the Ministry of Defense and the Ministry of the Interior

<sup>9</sup> For example, in national or international project management organizations

<sup>10</sup> See, for example, the Treaty of Aachen between Germany and France

<sup>11</sup> *Foreign Military Sales*



## WHAT IS NECESSARY?

- A solid and sustainably funded defense budget taking into account a Defense Planning Act
- An increase in the budget for research and development in Individual Plan 14

## 4. INTENSIFY COOPERATION WITH THE GERMAN ARMED FORCES

**Our companies support the Bundeswehr by taking over basic operations activities.** This enables the soldiers to focus fully on their core military tasks. Support models in which industry assumes more responsibility for the operational readiness of weapons systems<sup>12</sup> significantly increase their availability and ensure better predictability for users.

**Integrated career paths between the armed forces and industry help to retain highly skilled workers in jobs in which they can use their qualifications.** The armed forces and industry face a common challenge when it comes to human resources. Such cooperative models increase the operational readiness of the armed forces, further enhance the attractiveness of the Bundeswehr as an employer and fortify the national support industry.

## WHAT IS NECESSARY?

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

---

<sup>12</sup> See, for example, the introduction of performance-based logistics (PBL) for the Eurofighter weapon system, or the Eurofighter and helicopter System Support Centers, which have enabled a significant increase in operational readiness.

## IHR ANSPRECHPARTNER IM BDLI



Philip von der Schulenburg,  
Leiter Verteidigung & Sicherheit  
[schulenburg@bdli.de](mailto:schulenburg@bdli.de)

**Bundesverband der Deutschen Luft- und  
Raumfahrtindustrie e.V. (BDLI)**

Tel.: +49 (0)30 206140-0

[kontakt@bdli.de](mailto:kontakt@bdli.de)

[www.bdli.de](http://www.bdli.de)

März 2021