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# Position on Sustainable Transport Investment Plan (STIP)



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The Sustainable Transport Investment Plan (STIP), presented on November 5, 2025, is part of the EU's strategy to decarbonize the transport sector. Its goal is to ensure that the ReFuelEU Aviation and FuelEU Maritime regulations (which entered into force in 2024) can actually be implemented by bundling investments in clean fuel infrastructure and production.

## Political significance

- **STIP is considered a complementary initiative to the Green Deal Industrial Plan.**
- **It also aims to strengthen European energy autonomy, as fewer fossil fuels will need to be imported.**
- **Politically, it sends a signal to industry that the EU not only regulates sustainable mobility but also actively finances it.**

## 1. Aviation in the STIP – a clear focus area

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Aviation is one of the two main pillars of the plan.

### Specifically:

- Around one third of the announced €2.9 billion in EU funds (until 2027) is to flow into sustainable aviation fuels (SAF, eFuels).
- The plan explicitly refers to the implementation of the ReFuelEU Aviation Regulation, which requires airlines from 2025 onward to use an increasing share of sustainable fuels (2% in 2025 → 70% in 2050).

### Funding will support:

- SAF production plants (Power-to-Liquid, bio-kerosene, synthetic fuels)
- Logistics and blending infrastructure at airports
- Demonstration projects for 100% SAF-compatible engines and aircraft
- InvestEU credit lines for aircraft manufacturers and suppliers developing lightweight structures, electric systems, and hybrid propulsion technologies

## 2. Assessment from the BDLI perspective

### Positive aspects:

#### 1. Long-awaited signal for investment security

- Industry now knows that SAF and eFuels are not only regulated but also co-financed at the EU level.
- This could unlock private investments.

#### 2. Technological openness

- Unlike earlier programs, STIP does not exclude specific technologies – hybrid and hydrogen propulsion systems can also receive support.

#### 3. Strengthening European supply chains

- The focus on building European SAF production capacity reduces dependency on US IRA subsidies..

**Critical points:****1. Insufficient financial scale**

- €2.9 billion in EU funds until 2027 is not enough to realistically achieve SAF production targets (e.g. 6–8 million tons by 2030).
- BDLI calls for an increase via CEF and the Innovation Fund.

**2. Focus on fuels, less on aircraft technology**

- The plan supports fuel supply but does not directly fund new aircraft platforms, propulsion systems, or supplier innovations.
- For manufacturers, the expected impact is therefore only indirect.

**3. Complex application architecture**

- Funding instruments run through multiple programs (CEF, InvestEU, Innovation Fund) → high administrative burden and low predictability for SMEs.

**3. Strategic assessment for the aviation sector**

Category	Evaluation and Comment
<b>Signaling/Industrial Policy</b>	Clear pro-aviation signal, first dedicated financial framework
<b>Financial Volume/Impact</b>	Relatively limited, leverage effect crucial
<b>Technology orientation</b>	Strong for SAF, weak for aircraft technologies
<b>Competitiveness vs. USA/UK</b>	Decent – EU catching up, but IRA & UK Jet Zero Alliance still ahead
<b>Opportunities for German industry</b>	Good, especially for SAF suppliers, engine development, and engineering services

**4. Conclusion for BDLI**

STIP is a strategically important but financially limited instrument. For the aviation industry, it provides investment security for SAF, but no long-term answer for technology development (e.g. hydrogen aircraft or next-generation airframes).

**BDLI therefore calls for:**

- **Reliable, long-term funding for technology-oriented research (Clean Aviation JU/ Moonshot Clean Aviation/Horizon Europe) and related support instruments**
- **Simplified access to STIP funds for OEMs and suppliers**
- **Complementary national funding programs, such as Germany's LuFo aviation research program**

## About the aerospace industry

The German aerospace industry, represented by the BDLI e.V., is an integral part of the European aerospace industry. As a key strategic industry, the sector plays a decisive role in the technological and economic sovereignty of the European Union. It promotes economic growth, technological innovation and international connectivity. In Germany alone, the industry contributes significantly to GDP with over 120,000 employees and an annual turnover of over 52 billion euros.

Over the decades, Europe has worked together with industry, member states and the European Union to achieve a leading position in the aerospace industry. This must be maintained and further expanded in the face of international competition. In view of far-reaching technological, political and industrial changes, this requires sustained investment in research and innovation.

### German Aerospace Industries Association

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