



The industry that
connects and protects

Policy Recommendations
for EU Political Cycle
2024–2029



The industry that connects and protects

As European companies specialising in aerospace, security, and defence, we form an industry that connects and protects. We create the products that enable global mobility; and develop and supply the equipment that safeguards against internal and external threats.

Four industries, one industrial ecosystem: Our products are not just interconnected operationally and technologically; they're driven by a shared commitment – building a sustainable and secure Europe.

ASD is the voice of the European Aerospace, Security and Defence Industries. Our overall representation adds up to more than 4,000 companies, accounting for 98% of industry's total turnover and 92% of its total employment in Europe.



Europe at crossroads

Europe is facing the challenges of the green and digital transitions as well as a dramatically deteriorated security landscape. Its response to these challenges will shape our industry for decades to come.

At ASD, we encourage European cooperation and advocate for policies that promote a competitive business environment and leverage the full potential of our industries for the good of our societies.

In this spirit, we have outlined within this manifesto our policy recommendations for the EU Institution's upcoming five-year mandate (2024–2029).

DEFENCE

The strengthening of its defence industry must be a top priority for Europe



Enhance capacity to deliver

The European defence industry must be able to deliver the equipment that our armed forces need, at all times and under any circumstances. It must rapidly enhance its output to meet current urgent needs, and subsequently sustain an appropriate level of preparedness to rapidly ramp up production, if necessary.

The EU should support this through an ambitious European Defence Investment Programme.



Strengthen technological excellence

Decisions on short-term needs must not undermine long-term objectives. Robust investment in defence research is necessary to enhance Europe's technological sovereignty in critical areas and ensure operational superiority against potential adversaries.

The EU should support this through a substantial budget increase for a more strategic European Defence Fund.



Ensure appropriate funding

Making European defence fit for the new strategic environment will require commensurate financial resources. It is therefore crucial to ensure enduring defence investment in Europe.

The EU and its Member States should support this through a considerable increase of the budget-line for defence in the next MFF.



Facilitate access to finance

To expand their production capacities and remain at the technological edge, defence companies need access to private and public investment and finance.

The EU should facilitate this with political and regulatory measures that ensure that sustainability considerations and criteria do not discriminate against defence companies.



Ensure coherence

Today, the lion's share of defence procurement budgets in Europe is spent for equipment and systems from non-European suppliers. All EU initiatives and Member States' actions should contribute to reversing this trend.

To sustain a viable European defence industry, the EU must ensure that transversal policies and initiatives do not undermine defence instruments and programmes.



SECURITY

A vibrant European security industry to protect its citizens against complex threats



Develop a security industrial policy

There is no security without technology, and no technology without industry.

The EU must therefore reinforce the industrial dimension of its security. It should develop a security industrial policy that supports critical industries and mainstreams industrial considerations into all security-relevant EU policies.



Strengthen technological sovereignty

High-end security is as sensitive as defence. Therefore, Europe must reduce its dependence in strategic areas, such as critical infrastructure protection and cyber.

To achieve this, the EU should promote targeted investments in critical security technologies as part of a more strategic Security Union.



Foster synergies

To ensure effective and efficient allocation of scarce resources, synergies between technologies and coherence between EU programmes are essential.

To achieve this, the EU should consolidate security instruments into a European Security Fund and establish transversal flagship projects in security, defence and space.



Facilitate market uptake

Research activities should lead to technological solutions that find their way to the market.

To achieve this, the EU should develop a capability-driven approach that steers EU-funded security research towards clearly identified needs of European end-users.

CIVIL AERONAUTICS

A greener and competitive European aviation industry



Support climate-neutral aviation roadmap

Boost resources for innovation to properly support an EU-wide roadmap towards climate-neutral aviation, through research and innovation programmes incl. the Innovation Fund, a dedicated strand under the successor of Horizon Europe, and via financing of Public Private Partnerships like Clean Sky and SESAR.

Ensure that the European Aviation Safety Agency (EASA) is properly resourced to support the roadmap and the certification of new technologies.



Encompass entire aviation sector

Update the EU taxonomy to take fully into account the complete aviation sector (commercial and business).



Work towards a global solution

Work with ICAO on the global standards for international civil aviation to ensure the deployment of European technology on the global market and global climate-neutral aviation in line with ICAO's Long Term Aspirational Goal (LTAG).



Boost SAFs and new propulsion technologies

Increase the resources of the Renewable and Low Carbon Fuels value chain Alliance (RLCF) and of the Alliance for Zero Emission Aviation (AZE), to further promote the development of Sustainable Aviation Fuels (SAFs), and of hydrogen and electric aircrafts.



Leverage digital and emerging technologies

Implement the Digital European Sky through the deployment of SESAR technologies and the implementation of a net-centric Air Traffic Management (ATM) system.

Support emerging technologies such as Urban Air Mobility and other new advanced air mobility concepts.



SPACE

Space is key for the EU's freedom of action and autonomous decision-making



Budget in line with ambitions

An EU budget for space should reflect the increased ambitions of the EU:

Further evolution of ongoing programmes, new capabilities, and security and resilience-related requirements call for at least a doubling of the dedicated budget (without taking R&D into account).



Foster industrial leadership

Set up a coherent European-wide space industrial policy to address issues of fragmentation of demand and supply, duplication of capacities, low volume of European institutional markets and drop of Industry's profitability.

This dedicated industrial policy should be accompanied by an ambitious technology strategy.



Swift policy implementation

Enforce swift policy implementation of the Space Strategy for Security & Defence.

Support the contribution of space to European defence capabilities, enhancing the resilience of European space assets, allowing the responsiveness of our space capabilities, and preventing the proliferation of sensitive technologies and capabilities.

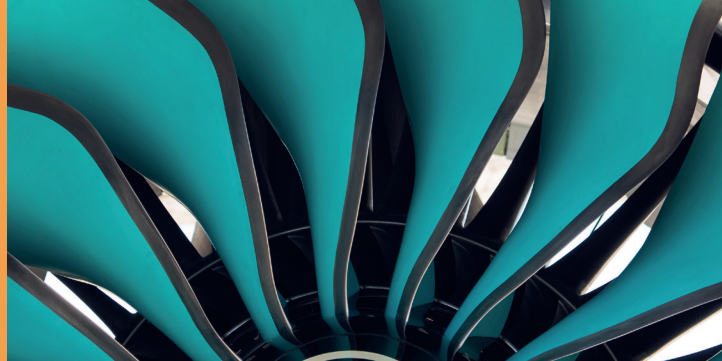


Enhance space security & resilience

Implement and promote "Space Traffic Management", relying on industry expertise and capabilities.

Implement the cyber security and resilience of all its ground and space assets to bring certainty in missions' continuity and guarantee system resilience.

Enhanced competitiveness and resilience of the European ASD industrial ecosystem



Promote strategic stakeholder engagement

The Commission should establish an upstream dialogue between the ASD ecosystem and the Commission on prioritisation and coherence, to foster synergies between instruments, identify bottlenecks, incentives and R&D opportunities, and to calibrate legislations in support of industrial competitiveness and resilience. It should also include a discussion on the duality of the ecosystem.



Secure access to critical raw materials, components and technologies

The next EU Industrial Strategy should recognise the strategic importance of the ASD ecosystem and include a sectoral approach focused on its specific supply needs in terms of material inputs (e.g., past and new generations of chips, critical raw materials) and critical technologies, in light of the new European Economic Security Strategy.



Ensure production continuity and avoid regulatory burden in chemicals legislations

Ensure the ecosystem is exempted from REACH restrictions where there are no viable alternatives.



Promote access to skills

Support the ASD ecosystem in securing a skilled workforce by reviving the ASD Pact for Skills with clear incentives from the EU budget and establishing 'net zero academies' to support upskilling and reskilling.



Support the digital transition and dual-use technologies

The EU should support the development of national or European strategies for the digitalisation of the ASD ecosystem with a clear commitment to facilitating the development, acquisition and employment of European technologies (cloud, AI, cyber, data platforms).



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