ACARE Position on the Future Framework for European Partnerships in Aviation under FP10

1. Strategic Importance of Civil Aeronautics and Need for Dedicated Partnerships

European civil aeronautics is a global success story and a cornerstone of European sovereignty, industrial competitiveness and high-skilled employment. Europe is a world leader in commercial aircraft, rotorcraft, engines, equipment, air traffic management technologies and aviation research. This leadership, however, cannot be taken for granted. Global competitors are massively scaling up public support to their aerospace industries, while aviation must simultaneously deliver climate neutrality and deep digitalisation.

Aviation is characterised by:

- exceptionally long technology development, industrialisation and certification cycles (often 15–20 years);
- very high technological and financial risk;
- stringent safety and certification requirements;
- deeply integrated cross-border industrial value chains and research ecosystems.

Maintaining European leadership will require sustained investment, long-term policy certainty and a coherent industrial strategy.

In this context**, institutionalised Joint Undertakings (JUs) have demonstrated unique added value.** They:

- Pool public and private investments and leverage substantial private co-funding, significantly increasing the overall investment in strategic research and innovation while ensuring shared investment risk and fostering long-term industrial commitment;
- Provide long-term, predictable roadmaps aligned with industrial strategies and with the length of development cycles in the Aviation sector (15 years+);
- Bridge the gap from research to large-scale demonstrators, by connecting the entire technology readiness and innovation chain;
- Support industrial and technological sovereignty and reduce strategic dependencies, promoting knowledge sharing and the use of European technology infrastructures;

- Enable a strong engagement of standardisation and regulatory bodies;
- Support training and educational programs to bridge labor gaps, attract talent, and upskill workers in specialized fields

In addition to this, **future aviation partnerships should:**

- strengthen Europe's technological sovereignty by reinforcing manufacturing capabilities and supply chain resilience across the entire research and innovation chain;
- maintain dedicated institutional frameworks for aviation research, development, demonstration and deployment including aviation Technology Infrastructures;
- support the development and validation of breakthrough technologies required for a safe, digital, competitive, and climate-neutral aviation;
- accelerate the needed modernisation and digitalisation of European air traffic management systems, to be able to cope with increased traffic volumes and safely introduce newer type of aircraft.

Discontinuing or diluting such instruments – especially in a sector with long innovation cycles – would create irreversible gaps in technology roadmaps, delay market introduction of climate-neutral solutions, weaken European competitiveness and ultimately affect growth, jobs and prosperity.

2. Future Architecture Under FP10: Why Aviation needs dedicated JUs

ACARE strongly underlines that civil aeronautics must remain a strategic priority under FP10, and advocates for:

a. Continuation of two dedicated aviation Joint Undertakings.

Clean Aviation and SESAR must remain the principal instruments implementing European aviation policy under FP10.
Both JUs have built strong, specialised relationships with regulators and operational actors, notably EASA for certification activities and Eurocontrol for Air Traffic Management. Their architectures are coherent, efficient and sector-specific; replacing these partnerships with generic calls or integrating them into broader horizontal structures would reduce effectiveness, weaken stakeholder engagement and undermine Europe's ability to maintain global leadership in a safe and sustainable aviation sector.

b. Conditional Support for a Single Aviation JU

If a reduction in the number of JUs is deemed unavoidable, the least-harm option would be a Single Aviation JU combining Clean Aviation and SESAR under strict conditions:

- Two clearly separated pillars,
- A Clean Aviation pillar focused on aircraft and propulsion technologies,
- A SESAR/ATM pillar focused on airspace operations, ATM technologies and drones/innovative air mobility,
- Preservation of both brands ("Clean Aviation" and "SESAR") as recognised operational pillars,
- Distinct Governing Boards, strategic agendas and work programmes for each pillar; pillar-specific steering and technical committees must retain delegated authority over roadmaps and call content,
- Total and enforceable ring-fencing of budgets between pillars, explicitly inscribed in the Single Basic Act,
- Strict control of membership per pillar and clear rules for third-country participation, based on reciprocity and effective financial contributions.

Under no circumstance should simplification objectives override the need for sector-appropriate governance and strategic focus.

3. Governance, Funding and Implementation Principles

ACARE puts forward the following recommendations for future FP10 aviation partnerships:

a. Governance

Establish a balanced, neutral and transparent governance with meaningful participation of:

- Industry (including primes, equipment suppliers and SMEs), to ensure that public investments remain aligned with industrial roadmaps, deployment needs and competitiveness objectives,
- Research and Technology Organisations (RTOs),
- Universities,
- Operators and service providers (airlines, MROs, airports),
- Member States (via programme committees and States Representatives Groups).

Strengthen the role of RTOs and universities not only as beneficiaries but also in the design, governance and strategic programming of future partnerships,

Strong industry-driven governance and meaningful participation in strategic decision-making,
Prevent conflicts of interest by ensuring that beneficiaries do not directly decide on individual grant allocations,
Maintain and deepen links with key regulatory and operational stakeholders (EASA for certification and safety oversight, Eurocontrol and the "ATM Master Plan" for ATM strategy and deployment,
Use the "ATM Master Plan" as a key reference for ATM research, innovation and deployment activities,
Maintain efficient, predictable and streamlined decision-making processes,
Avoid unnecessary complexity that could arise from overly broad or merged partnerships,
Avoid unnecessary administrative burden, to maximise the effective use of the funding for real technology development and validation.

b. Funding

Secure long-term, ring-fenced budgets for civil aviation and ATM under FP10, providing planning certainty and maintaining strategic autonomy;
Where entities from associated countries are awarded funding through JU calls, a corresponding financial contribution should be allocated to the JU and deducted from those countries' contributions to FP10. This mechanism would safeguard the funding originally intended for entities from EU Member States;
Preserve In-Kind Contributions to Operational Activities (IKOP) and In-Kind Contributions to Additional Activities (IKAA) as central instruments for leveraging public funds;
Explicitly avoid mandatory cash payments into a joint funding pot, as this would mean financing competitors and would undermine competitiveness, reduce participation incentives and weaken private-sector engagement, especially from SMEs. Such an option will be a knockout criterion for the participation and engagement of private partners.
Maintain the current public-private partnership model for aviation and avoid tripartite schemes where Member States become formal members of the JU, which would increase complexity and run counter to simplification objectives.

4. Programme Design and the Full Innovation Pipeline

Future aviation partnerships must cover the entire innovation chain from low TRL research to market deployment, including support to Technology Infrastructures, with a balanced mix of bottom-up and top-down approaches with:

- a bottom-up collaborative research stream focused on basic and applied research, research driven and open to all stakeholders, involving the diverse stakeholder community and in particular smaller actors such as RTOs, universities, and SMEs supported by the next FP10/Horizon Europe 2,

- a top-down high-TRL research stream, similar to existing JUs, focused on demonstration activities led by industry and supported by FP10, and
- a deployment stream, supporting the uptake and scaling of mature aviation technologies and solutions, funded by the proposed ECF. Close coordination with the European Competitiveness Fund (ECF) and other deployment instruments is vital to bridge the "valley of death".

Clear separation shall be maintained between civil and military research programmes, while enabling dual-use exploitation of technologies where appropriate and beneficial.

5. Stakeholder Ecosystem, Certification and Impact

To maximise impact, future aviation partnerships should:

- Foster collaboration across the entire ecosystem: industry, RTOs, universities, SMEs, operators, service providers and Member States,
- Use frameworks such as ACARE to jointly define European strategic research, innovation and industrialisation agendas, ensuring alignment between programme priorities, calls for proposals and the European Aviation Strategy,
- Ensure early and continuous interaction with EASA and other regulatory bodies throughout the R&I process, accelerating certification and strengthening Europe's influence on international standards,
- Broaden the notion of "impact" to include:
  - long-term technological leadership (including on Technology Infrastructures),
  - resilience of supply chains,
  - workforce development, education, training and upskilling,
  - dissemination of knowledge, publications and patents, while safeguarding technological sovereignty,
- Highlight and communicate success stories, demonstrators and outcomes at major European and international forums, reinforcing Europe's image as the global leader in safe, sustainable and innovative aviation.

6. Conclusions and Recommendations

ACARE calls on the European Commission to:

1. Strengthen the strategic role of aviation within EU climate, industrial and mobility policies, recognising that decisions taken under FP10 and the next MFF will determine Europe's ability to remain at the forefront of global aviation for decades to come,

2. Maintain dedicated aviation frameworks under FP10: continue Clean Aviation and SESAR as distinct and complementary institutionalised partnerships or, if a merger is unavoidable, establish a single Aviation JU with distinct, ring-fenced pillars and tailored governance,

3. Reject any option that merges aviation with other transport sectors and dilutes priorities, funding and governance for civil aeronautics and ATM,

4. Guarantee a ring-fenced, multiannual EU-budget dedicated to civil aviation research, amounting to approximately €6 billion under FP10, embedded in a broader civil aviation investment envelope of approximately € 22 billion, commensurate with Europe's strategic objectives and the decarbonisation efforts that still need to be undertaken,

5. Enshrine in the Single Basic Act:
   - sector-specific governances for Clean Aviation and SESAR (or their pillars);
   - strict ring-fenced budgets for civil aviation and ATM;
   - clear membership rules and reciprocity for third-country participation;
   - preservation of in-kind contribution models (IKOP and IKAA);
   - multiannual stability of work programmes without arbitrary termination.

   so that institutional simplification does not come at the expense of operational effectiveness and EU competitiveness,

6. Ensure full TRL coverage and balanced stakeholder participation, by combining:
   - small collaborative research using a bottom-up approach,
   - Technology Infrastructures,
   - medium-scale demonstrators,
   - large integrated demonstrators,
   - deployment projects supported by instruments such as the ECF,
7. Strengthen EASA as a key enabler for the entire innovation chain from low TRL research to market deployment.

To answer specifically to the five "problem areas" identified by the Call for Evidence:

1. **Partnerships are not aligned with the current strategic vision and there is a weak EU steering.**
   Clean Aviation and SESAR JUs are well aligned with the current EU strategic priorities because they directly support the EU's goals for competitiveness, technological sovereignty, civil-military collaboration (for SESAR), resilience, green transition and digitalisation. They both leverage strong cooperation between industry, research organisations, regulators, and Member States and translate the policy objectives into a structured innovation and deployment pipeline. The next SBA should preserve and strengthen the mechanisms that allow to connect R&I, industrialisation, regulation and deployment at scale.

2. **Institutionalised partnerships do not fully support the uptake and deployment of new technologies by EU industry**
   The partnerships fully support the uptake and deployment of new technologies by EU industry by providing a structured framework that bridges the gap across the full research-to-deployment lifecycle. Through long-term, predictable roadmaps and dedicated funding streams, they enable industry to plan, invest, and commit to the large-scale demonstration and validation of breakthrough technologies. The active involvement of industry, research organisations, SMEs, and regulators within these partnerships ensures that technology development closely matches real operational needs and certification requirements.
   Close coordination with deployment instruments, such as the proposed European Competitiveness Fund (ECF), further accelerates the commercialisation and scaling of new aviation technologies.

3. **Private co-funding is insufficient to create significant impact, EU budget does not leverage meaningful contributions from private partners, in particular cash contributions, and private co-funding relies highly on in-kind contributions.**
   Private co-funding leverages substantial investments alongside public funds, amplifying the overall resources dedicated to strategic research and innovation. This shared investment model not only increases the scale and scope of activities that can be undertaken, but also ensures that private partners are deeply committed to the success and market relevance of new technologies. By pooling resources, financial risks are distributed, encouraging more ambitious projects and long-term industrial commitment. The EU budget effectively acts as a catalyst, attracting high levels of private contribution and involvement, especially from primes, equipment suppliers, and SMEs.

The predominance of in-kind contributions reflects the characteristics of the Aviation sector. Developing and validating aviation related technologies require operational environments, engineering teams, research and technology infrastructures, simulators, test facilities that represent substantial investment and are often more relevant in the context of the Public-Private Partnership than financial transfers.

4. **Cross-fertilisation and knowledge dissemination is low, JUs work in silos and are not fit for cross-cutting initiatives**

   JUs actively engage a broad ecosystem— including industry, research and technology organisations, universities, SMEs, operators, and member states — ensuring diverse perspectives and collaborative innovation. They provide structured frameworks that promote joint agenda-setting, shared use of European technology infrastructures, and ongoing interaction across borders and disciplines. This environment fosters knowledge sharing, the development of best practices, and the propagation of research results, demonstrators and publications. These partnerships governance allow for flexibility, sector-specific focus, and inclusion of various stakeholders that drive collective progress and create synergies that amplify impact across the entire European aviation landscape.

5. **The JU landscape is complex to enter and navigate, complex governance, fragmentation and overlaps across several JUs. There is also a relatively low level of openness towards new members and participants in JUs, compared with the rest of the framework programme**

   The partnerships landscape in European aviation has a clear and sector-specific structure, that offer predictable governance, transparent procedures, and well-defined strategic agendas, which help participants understand how to engage and contribute effectively. Their focused approach minimizes unnecessary fragmentation and overlap, allowing stakeholders to follow consistent roadmaps and processes tailored to the aviation sector's needs in highly regulated, safety-critical sector

   ACARE welcome the objective of improving coherence, transparency and simplification through a Single Basic Act for European Partnerships. However, simplification must not come at the expense of losing strategic focus, sectoral effectiveness, or the artificial consolidation of partnerships addressing fundamentally different technological and operational challenges.

Europe's civil aeronautics sector is at a strategic turning point. Maintaining and optimising dedicated aviation partnerships is not simply a research policy choice; it is a decisive investment in European sovereignty, competitiveness, sustainable growth and high-skilled employment.