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European Commission

CALL FOR EVIDENCE
FOR AN INITIATIVE (without an impact assessment)

This document aims to inform the public and stakeholders about the Commission's work, so they can provide feedback and participate effectively in consultation activities.

We ask these groups to provide views on the Commission's understanding of the problem and possible solutions, and to give us any relevant information they may have.

TITLE OF THE INITIATIVE	Supporting the competitiveness and global leadership of the European aviation and aeronautical industries
LEAD DG – RESPONSIBLE UNIT	DG MOVE, Aviation Policy Unit (E1)
LIKELY TYPE OF INITIATIVE	Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions
INDICATIVE TIMING	Q3 2026
ADDITIONAL INFORMATION	Air - Mobility and Transport - European Commission

A. Political context, problem definition and subsidiarity check

Political context

The EU's industrial leadership in the aviation and aeronautical sectors plays a vital role in the EU economy. They are also of strategic importance for the Union's sovereignty. Home to leading manufacturers in aircraft and air navigation systems, the EU hosts a network of performant airlines and attractive airport hubs. Supported by a large value chain of businesses and a network of specialised universities, air transport directly supports 2 million jobs and directly contributes EUR 174 billion to the EU's GDP[1]. Their success relies on industrial excellence and the EU's single aviation market. The EU adopted in 2015 its first Aviation Strategy for Europe, focused on enhancing connectivity, capacity and market access. More than a decade later, the global aviation landscape has fundamentally evolved. While spearheading climate efforts, the EU aviation and aeronautical sectors now face intense new pressures within a fast paced, competitive and increasingly challenging global environment.

In line with the Competitiveness Compass, the Clean Industrial Deal and the Draghi report, a new comprehensive approach for the aviation and aeronautical industry is needed, in synergy with the defence and aerospace policy framework. It will focus on ways to support the sector's green and digital transformation, boost investments in innovative, AI and clean technologies, foster innovation, enhance strategic autonomy, and ensure that the EU industry can compete on a level playing field. It will also aim to increase resilience to security threats and major crises. The initiative will deliver on the Commission work programme 2026's promise to 'look into ways to support our aviation and aeronautical sectors to retain their competitiveness and global leadership as they prepare for transformation'.

Problem the initiative aims to tackle

More than a decade after the adoption of the 2015 Aviation Strategy for Europe, the global aviation landscape has fundamentally evolved. The EU's aviation and aeronautical sectors face complex new challenges needing coordinated action:

- The competitiveness of EU airlines on international routes is pressured by strong growth in emerging markets and attractive airport hubs outside of the EU. The EU has adopted ambitious legislation to accelerate climate

[1] Air Transport Action Group (ATAG), *Aviation Benefits Beyond Borders*, Oxford Economics, 2024.

action in aviation. A global level playing field is paramount to supporting the competitiveness of EU airlines and attractiveness of EU hub airports.

- The EU aeronautical value chain depends on a reliable, diversified supply chain, including critical raw materials and chips to deliver its innovative technologies and support the green and digital transition. Unpredictable global trade creates uncertainty for the EU's strategic autonomy. This challenge arises alongside the expected rapid growth of competing global aircraft manufacturers, paired with foreign takeover of EU aviation startups.
- Global competitors are significantly increasing investment in aviation research and innovation (R&I) and moving rapidly towards the deployment of emerging technologies, posing a threat to today's European leadership in aircraft manufacturing.
- The deployment of unmanned air transport services across the EU remains slower than anticipated due to the fragmented implementation of the regulatory framework. Technical hurdles to integrate into controlled airspace and challenges for infrastructure funding slow down the adoption of unmanned aviation. The global landscape for the manufacturing of unmanned aerial systems and electric vertical take-off and landing aircraft (eVTOL) has also profoundly changed. The EU is at risk of losing autonomy in a sector of growing strategic importance.
- Productivity limitations challenge competitiveness. Airlines and airports face capacity constraints and air navigation inefficiencies caused by the incomplete and fragmented implementation of the Single European Sky (SES), with stagnating air traffic management technology development and slow integration of unmanned aviation. The growth of space operations poses safety challenges for civil aviation. The industry is challenged to deploy disruptive digital and AI-assisted technologies to achieve a safe, integrated, efficient air transport network.
- Global conflicts threaten aviation safety and security. Incidents like Global Navigation Satellite System (GNSS) interference, drone incursions, conflict zones and irregular migration activities, highlight aviation vulnerabilities. Recent major crises such as COVID-19, Russia's war against Ukraine and the rising conflicts in the Middle East have pressured the sector's resilience. These conflicts require strengthening Europe's aviation, both manned and unmanned aircraft systems, with cross-fertilisation between civil and military and dual-use products.

Supporting the sector's transformation to preserve its global competitiveness, while addressing existing dependencies, is an imperative that strongly aligns with other key EU priorities, notably resilience, climate action, defence, and digitalisation.

Basis for EU action (legal basis and subsidiarity check)

Legal basis

Art 90 TFEU defining the framework of the common transport policy

Practical need for EU action

The Strategy will cover domains falling under competences shared with EU Member States (such as transport, security, internal market, environment, energy) and therefore the principle of subsidiarity needs to be complied with. Air transport is by essence a global transport mode, in addition to having a highly integrated EU aviation single market. Consequently, an EU-level and coordinated approach is needed to address the challenges and opportunities faced by the aviation and aeronautical sectors, the majority of which can be best addressed at European level.

B. What does the initiative aim to achieve and how

The objectives pursued are to:

- Support the EU aviation and aeronautical sectors' competitiveness and shield them from unfair competition by levelling the playing field, implementing new economic security and fair competition tools, and refining market rules. This includes enhancing the sectors' strategic autonomy by strengthening the European value chain, addressing overdependencies for the access to aviation fuels, critical materials, components and technologies, enhancing circularity, and ensuring that EU aviation and aeronautical sectors benefits from modern and

sovereign IT and data ecosystem. Digitalisation across the entire value chain will be crucial. More investments will be needed to support fleet and infrastructure modernisation. Reaffirming the imperative to lead on making aviation more sustainable, strategically autonomous and to support climate and noise mitigation efforts in aviation will be key, notably by deploying low and zero-emission novel propulsion solutions, making the necessary adaptations to deploy such solutions, and taking clear steps to implement the sustainable aviation fuels support measures announced in the Sustainable Transport Investment Plan.

- Support the EU's continued industrial leadership through transformation of the aviation and aeronautical sectors for decades to come, by delivering a re-energised and strategically aligned aeronautical R&I policy (delivering the "clean and smart aviation moonshot"). Building on the successes of Clean Aviation, Single European Sky Air Traffic Management Research (SESAR) Joint Undertakings, and other EU and national R&I instruments, the 'moonshot' initiative will improve strategic research coherence, mutualise resources and forge new synergies. A unified and comprehensive approach covering all stages and segments of the ecosystem is crucial to accelerate the green and digital transition and secure the EU's global leadership in aviation, including dual-use aircraft – whether manned or unmanned, air navigation services, emerging startups, and tackling digital and social challenges (e.g. use of biometrics at airports for improved security and facilitation).
- Boost the large-scale deployment of unmanned aircraft, by accelerating the implementation of an enabling regulatory framework, supporting R&I creating enablers for automation, navigation and anti-jamming technologies.
- Increase aviation's resilience to emerging security threats such as GNSS interference, drone incursions, use of aviation for irregular migration, and potential future major crises. Enhance the dual-use capabilities of the sector and further leverage the Military Mobility package measures and translating them into concrete action.
- Unlock the sector's full potential for a safe, integrated and efficient air transport network, by addressing capacity constraints and air navigation inefficiencies through implementation and enhancement of the SES framework. Leverage digital innovation and AI technologies to accelerate the integration of unmanned aircraft and deployment of air traffic management (ATM) technologies.
- Provide an air transport sector that serves passengers and citizens, by delivering on air passenger rights, notably passengers with reduced mobility, improving transparency for consumers upon booking and facilitating air travel conditions.
- Addressing labour challenges, making air transport more attractive to professionals, and developing the necessary training programmes for the next generations of professionals.

Likely impacts

The Strategy should give the aviation and aeronautical sectors a clear and renewed vision and plan of action/roadmap for the next decade. While the Strategy cannot be expected to single-handedly resolve every challenge, its primary value will lie in identifying gaps and critical bottlenecks and equipping the aviation value chain with the tools necessary to address them. Consequently, the Strategy should serve as a catalyst, positioning the EU sector to better defend its global industrial leadership and improve its competitiveness and strategic autonomy, and strengthen its resilience. It should create the conditions for supporting the green and digital transition of air transport, maintaining the highest level of safety, social and environmental standards, and enhance aviation's dual-use capabilities and synergies with the aerospace industry, as well as its readiness for military mobility, crisis resilience and bring benefits for passengers. Ultimately, the extent of the Strategy's impact will depend on the industry's ability to leverage these measures, for the EU and national authorities to simplify the applicable regulatory frameworks and adapt to a changing global environment.

Future monitoring

Overall monitoring of the Strategy will be ensured primarily through existing mechanisms, with no additional reporting burden on Member States or businesses. It will include exchanges in the Council Aviation Working Party as well as the relevant Commission expert groups related to air transport. Specific monitoring arrangements for the individual initiatives that may follow up on the Strategy will feed into this process.

C. Better regulation

Impact assessment

The initiative will be a non-legislative Communication that recommends actions to strengthen the EU aviation and aeronautical sectors and their supply chain, bolstering their ability to maintain leadership in an increasingly complex global context. Any legislative initiative announced therein or adopted simultaneously will be subject to impact assessments, where justified in terms of policy choices or impacts, in line with the Better Regulation requirements.

Consultation strategy

The Commission will consult as widely as possible in order to gather key information and ensure that the general public interest of the EU is reflected in the design of the initiative. The current call for evidence, which will remain open for 4 weeks, offers the opportunity to the general public and stakeholders concerned to contribute views, and to provide data and evidence. The Commission will also hold targeted consultations with Member States and relevant stakeholders as well as a high-level industry dialogue with the sector.

The main stakeholders identified as likely to be interested in this initiative include Member States (including departments for transport, economy, energy, environment and climate), air carriers (passenger and cargo), manufacturers of aircraft – whether manned or unmanned, and air navigation systems, airports, air navigation service providers, air transport professionals, energy companies, the social partners, aviation experts, think tanks and NGOs, consumer and passenger organisations, academia and members of the public.