



White Paper on the Aerospace Strategy of the Federal State of Baden-Württemberg

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Baden-Württemberg – THE LÄND with a focus on aerospace

The Aerospace Strategy of the federal state of Baden-Württemberg lays the groundwork to ensure that players in Baden-Württemberg's aerospace industry will not just maintain their current positions of strength in the upcoming decades but expand them further and focus on new developments which will be of prime importance for society and sustainability, such as climate-neutral aviation and data services for environmental monitoring, navigation, and communications.

Baden-Württemberg is already one of the most successful locations for the aerospace industry in Germany. Around 16000 employees generate an annual turnover of around 5 billion Euros. The aerospace industry in Baden-Württemberg spends about 17.5 percent of its turnover on innovation and has been a technological pacesetter for many other sectors for decades. Significant location advantages which have helped to make Baden-Württemberg an aerospace giant are the state's outstanding scientific and research infrastructure, a close-knit network of top-performing manufacturers and suppliers, and highly specialised industrial suppliers. The state has many university and extramural research institutions whose importance extends far beyond state borders, including the University of Stuttgart, the German Aerospace Centre (DLR), the Fraunhofer Society (FhG) and the Max Planck Society (MPG).

The aerospace industry is currently facing the challenge of implementing significant structural changes, especially with regards to the goal of climate neutrality. In addition to traditional activities such as building earth observation satellites or spacecraft for exploration missions, the aerospace industry is also entering a fundamentally new area of activities, best summarised under the heading "New Space", which includes the increased commercialisation of space travel and the series production and maintenance of large satellite swarms.

As one of the most successful aerospace regions in Germany and Europe, Baden-Württemberg is concentrating on maintaining its leading position during the current transformation processes and on generating innovative and high-quality developments. With its Aerospace Strategy, the state of

Baden-Württemberg aims to focus the attention of programme managers in federal government, the EU and the European Space Agency ESA on the strengths of aerospace actors in Baden-Württemberg and make use of available opportunities to become involved in national and international initiatives.

Overview of aerospace measures from 2023 to 2026

Looking to the future, Baden-Württemberg should continue to be one of the most successful aerospace regions. An extensive package of measures for the years 2023 to 2026 has been launched to provide support to the sector as it deals with the current challenges and develops long-term perspectives for the future. These measures consist of projects which will be implemented in addition to current and ongoing state activities such as the basic funding of research institutions or the continued support provided to the sector.

In the area of **digital aerospace**, the spotlight is on the sector's digitalisation, data-based developments, potential new growth areas created by the increased use of satellite data, and the resulting new business models. Proposed measures include a central digital platform for the planned European test centre for aviation security (Measure 2.2) and support for the rapid technological advances generated by the IRAS project (Measure 3.1).

A **sustainable aerospace industry** will focus on the development of climate-friendly aerospace technologies, sustainable aviation fuels, new forms of propulsion such as hydrogen, and the creation of the brand "Sustainable Aerospace made in BW". Concrete measures include the establishment of a Hydrogen Excellence Centre at Stuttgart Airport (Measure 2.4) and a Centre for Green Space at the CCI Reutlingen (Measure 3.2.2) as well as the strengthening of research capabilities at universities as an important step towards Aerospace 2050 (Measures 2.1 & 3.2.3).

The objective of a **cooperative aerospace** must be to increase connections within the sector and the sector's visibility as well as improving political representation and strengthening cooperations between the aerospace industry and other sectors. The appointment of coordinators Prof. Peter Middendorf and Eckard Settlemeyer (Measure 1.2), the establishment of THE aerospace LÄND office (Measure 1.3), and the setting up of an aerospace advisory board will promote networking between aerospace actors in Baden-Württemberg. The Aerospace Strategy also includes measures to encourage and attract skilled workers as the basis of the future aerospace technology (Measure 1.4) and to support start-ups under the auspices of the Start-up BW campaign (Measure 3.3).