

# Aerospazio in Piemonte

**Special edition  
for Farnborough International Airshow**

RIVISTA DEL DISTRETTO AEROSPAZIALE PIEMONTE  
N.4 - GIUGNO - LUGLIO 2026



# SPACE FOR LIFE

CREDIAMO NELLO SPAZIO COME  
NUOVO ORIZZONTE DELL'UMANITÀ  
PER COSTRUIRE UNA VITA SULLA TERRA  
MIGLIORE E SOSTENIBILE.





**MAURIZIO DE MITRI**

**President of the Piedmont Aerospace Cluster**

# PIEDMONT'S EUROPEAN VISION

**W**ith the signing of the Memorandum of Collaboration (MoC) during the ILA Berlin Air Show, the Piedmont Aerospace cluster (DAP) and AeroSpace.NRW of North Rhine-Westphalia formally position themselves to lead the most advanced aerospace sectors and drive a transition toward increasingly sustainable aviation in Europe.

This is a major strategic alliance involving more than 850 companies and placing Piedmont at the centre of the continent's technological and manufacturing geopolitics. The agreement crowns a path of bilateral relations and industrial diplomacy between the two regions that began in 2022. For Piedmont, this strategic accord is an internationally significant initiative that comes only weeks after the national memorandum of understanding signed at the Castello del Valentino with the Lombardia (LAC) and Liguria (SIIT) clusters.

DAP's international vision is clearly focused on bringing together regions with strong aerospace specialisation to aggregate strategic competencies needed to face future challenges, maximising returns on major programmes and gaining access to European Union funding sources

(Horizon Europe, Clean Aviation, European Defence Fund).

By bringing the Piedmont aerospace supply chain — which comprises over 450 companies, 35,000 employees and roughly €8 billion in annual turnover with about 60% exported — closer to the economic powerhouse of North Rhine-Westphalia (some 400 specialised companies and a German aerospace turnover exceeding €50 billion), the agreement leverages extraordinary technological complementarity. Turin's historic leadership in airframes, engines, transmissions and space habitation modules (with players such as Leonardo, GE Avio Aero and Thales Alenia Space) pairs naturally with German excellence in lightweight materials, hydrogen propulsion and industrial additive manufacturing. DAP's strategic projection, however, does not stop at continental Europe. The agreement signed in Berlin serves as an ideal springboard for an even more ambitious geopolitical strategy. The next objective is to open channels of dialogue and new collaboration opportunities with other European actors.

Commercial and scientific integration with additional supply chains can open decisive outlets for Piedmontese companies in next-generation defence programmes, drone logistics and transnational advanced air mobility. Piedmont thus demonstrates that it is not merely the historical cradle of Italian automotive industry, but a true global "Space Valley": a mature ecosystem capable of orchestrating European innovation and permanently positioning its SMEs and research excellence centres on the most strategic and competitive markets of the international arena.

## "Aerospazio in Piemonte"

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## BOEING

BOEING IS AN AMERICAN AIRCRAFT MANUFACTURER THAT MANUFACTURES AIRCRAFT FOR BOTH CIVIL AND MILITARY USE

# RIDING THE NEXT WAVE: PASSENGER GROWTH, SUPPLYCHAIN OPPORTUNITY, AND BOEING'S COMMITMENT TO ITALY

Air transport is entering a long, sustained period of growth opportunity. Boeing's 2025 Commercial Market Outlook forecasts nearly 44,000 commercial airplanes will be needed over the next 20 years, driven by emerging market expansion and airline fleet renewal. Passenger traffic is projected to grow 4.2% annually, more than doubling by 2044. Single-aisle airplanes will comprise roughly 72% of the global fleet as shorthaul travel and lowcost carriers flourish, while widebody demand expands as carriers in emerging markets extend longhaul networks.

This macro trend is not just a demand signal for aircraft; it is a catalyst for the entire aerospace ecosystem. About 80% of inservice airplanes are expected to be

replaced over the next two decades, creating increasing demand for parts, systems, MRO services and advanced manufacturing in the aftermarket. At the same time, supplychain diversification and resilience — priorities sharpened by recent global disruptions — mean manufacturers and Tier1/2 suppliers with proven quality, flexibility and geographic reach will play an outsized role.

### ***Supply chain principles that convert demand into opportunity***

To translate aircraft demand into durable industrial growth, Boeing emphasizes a set of practical, relationshipcentered supplychain practices:

- Stability through optimization:

we prioritize stability by optimizing sourcing strategies, lead times, buffer stock and capacity planning. This reduces volatility and ensures predictable support for production and airline operations.

- Handson recovery support: we actively partner to support supplier recoveries through our Supply Chain Global Field Operations organization.

- We are supportive



of efforts to open new avenues and sourcing to help ensure we maintain a healthy, diverse supply chain.

***Boeing in Italy: a 75year partnership delivering industrial impact***

Italy is already central to this global equation. Boeing and Italy have collaborated for 75 years across commercial and defense programs. Italian industry is present on every model of Boeing commercial aircraft. Italy is one of Boeing's most important supplier sources in Europe: more than 30 direct suppliers and a wider Tier2 network support Boeing programs, with a Boeing spending of around \$1billion annually with Italian industry. An Oxford Economics study estimates Boeing's activities support over 16,000 jobs in Italy, showing how global fleet expansion translates into local economic value.

Leonardo exemplifies this partnership. From historic work on the DC9 and 767 to the



787 Dreamliner today, Leonardo manufactures critical airframe structures — including 14% of the 787's airframe. 787 is the world's best-selling passenger widebody aircraft of all time, set for continued, paced growth into the next decade. Numerous second tier Italian firms supply advanced equipment, composite components and machine tools — capabilities precisely aligned with the coming decades' needs.

Beyond airframes, Boeing Italy cooperation spans defense programs, on both platforms and logistic sustainment — KC-46 tankers, CH47F Chinooks, MH139 helicopters, NATO AWACS /FLEP programs, E-7 Wedgetail, MQ-28, V-22. KC-767 and CH-47F programs in Italy embed national industry in logistics, maintenance, training and engineering roles throughout the aircraft lifecycle.

***Investing in people and com-***

***munities***

Boeing's engagement in Italy extends to communities and the future workforce. Programs focused on STEM, environmental, and civic education, as well as the Newton Room interactive classrooms (hosted for the first time in Italy in Turin in 2022) nurture future talent, essential to the aerospace and defense sector.

***An opportunity for Italy***

Italy can turn global aircraft demand into sustained, high-quality local jobs, increased innovation, and expanded exports. By pairing Italy's proven industrial strengths with a stable, world-class and disciplined supply chain, the country is well positioned to capture the next wave of global aviation growth. Together, we can transform that bright forecast into a shared industrial victory for the nation.



**SAFRAN - MICROTECNICA**

ELECTRONICS & DEFENSE

# MICROTECNICA: A CENTURY OF EXCELLENCE IN FLIGHT

FROM CINEMATOGRAPHY MECHANICS TO CRITICAL ACTUATION SYSTEMS, THE HISTORIC TURIN-BASED COMPANY CHARTS THE COURSE OF THE FUTURE UNDER THE WING OF THE SAFRAN GROUP

**F**ounded in 1929 as a pioneering manufacturer of cinema projectors, Microtecnica has radically reinvented its technological DNA over the decades, transforming itself into an essential pillar of the international aerospace landscape. An industrial

journey spanning nearly a century, seamlessly blending the precision of Piedmontese mechanical tradition with the most challenging frontiers of modern flight.

After repurposing its operations during World War II, Microtecnica's true strategic turning point

arrived in the 1960s. During this period, the company permanently linked its name to the most ambitious global aeronautical and space programs, developing cutting-edge expertise in flight controls, precision mechanics, and complex systems integration. This steady growth, marked by acquisitions and prestigious transatlantic partnerships, ultimately led to its acquisition by the Safran Group in 2025, definitively consolidating its role as a global supplier of excellence.

An Ecosystem on Three Pillars Today, Microtecnica looks ahead to its historic centenary milestone in 2029, relying on over 800 specialized employees distributed across three complementary, highly technological production sites. The Turin headquarters serves as the engineering brain and development



center, focusing on mechanical actuation systems for aerospace, defense, and space applications. The Luserna San Giovanni facility specializes in high-performance valves, environmental control systems, and sophisticated test benches. Finally, the Brugherio site represents excellence in flight controls for helicopters and critical servo-actuator subassemblies.

This formidable industrial architecture sustains a business portfolio evenly balanced between the civil and military segments, with 45% of revenue generated in the Italian domestic market and an impressive 55% from exports. The world's leading Original Equipment Manufacturers (OEMs) rely on Microtecnica: the company's technologies are on board iconic programs such as the Eurofighter, Panavia Tornado, and Saab Gripen, as well as major commercial and rotary-wing platforms from giants like Airbus, Leonardo, NH90, Bombardier, and Cessna. Further confirming the company's industrial centrality, the Turin headquarters recently hosted a DAP delegation. The corporate leadership—led by Managing Director Marco Rancati, Business Development Director Marco D'Ascenzi, and Engineering Director Giuseppe Musso—highlighted the site's recent manufacturing advancements, laying the groundwork for



*DAP visits Microtecnica Torino in March 2026*

crucial future collaborations. Safety, Efficiency, and a Vision for Tomorrow At the heart of Microtecnica's success lies an uncompromising value proposition based on three priorities: absolute flight safety, maximum competitiveness, and measurable operational performance. This rigorous culture of continuous improvement, supported by Nadcap-certified processes, allows the company to combine utmost reliability with extraordinary industrial responsiveness, reducing prototype development times by up to 30%. This is a vital asset for next-generation defense programs, including the next generation aircrafts sixth-generation fighter, the new Leonardo AW249 exploration helicopter, the

M346 advanced trainer, and the missile systems.

To support a rapidly expanding market in the space, military, and commercial aviation sectors, the company is investing heavily in industrial capacity and local infrastructure: a new 4,500-square-meter manufacturing facility was recently inaugurated in Turin. Supply chain expansion and a long-standing strategic partnership with the Polytechnic University of Turin to attract top engineering talent complete Microtecnica's formula—a robust organization approaching its first one hundred years with the energy and vision of a company that has only just begun to fly high.

**BLUE ENGINEERING SRL**

IS A LEADING BENCHMARK IN AUTOMOTIVE, RAILWAY,  
AND AEROSPACE ENGINEERING AND DESIGN

# MULTIDISCIPLINARY INTEGRATION FOR NEXT-GENERATION AEROSPACE

In the European aerospace technology landscape, increasingly driven by complexity, digitalization, and sustainable technologies, BLUE Engineering stands out for its ability to combine industrial experience, applied research, and technological innovation. Founded in Northern Italy in 1993, the company has built its growth on a strategy of

diversification across sectors and markets. This vision enabled the development of cross-disciplinary expertise now fully applied in the aeronautical and space industries, where multidisciplinary integration is essential.

A key strength of BLUE Engineering is its systemic approach to design, supported by multidisciplinary engineering teams. Through "Technology Cross-Fertilization," the company transfers methodologies and solutions across automotive, railway, naval, and aerospace sectors, accelerating innovation while reducing development time and costs. BLUE finds this approach especially useful in aerospace, where structures, fluid dynamics, systems, and materials must con-

verge to address challenges such as hybrid propulsion, unconventional aircraft, and advanced space missions.

In the aeronautical sector, BLUE Engineering covers the full development cycle of subsystems and components. Activities include the design of primary and secondary airframes using aluminium, titanium, and carbon-fiber composites; development of nacelles and propulsion systems; cabin interiors and HVAC systems; and test benches for structural and functional validation. A systemic and deep integration of design and virtual validation enables BLUE to reduce reliance on physical prototypes and faster certification processes.

The company's technological core relies on advanced computational methodologies, inclu-



*Mohammed Eid - CEO of Blue Engineering*

ding CFD (Computational Fluid Dynamics) and FEM structural analysis. These tools are applied to commercial and regional aviation, unconventional configurations such as blended wing bodies and eVTOLs, hypersonic systems, and thermofluidic integration. Numerical modeling supported also by proprietary tools, enables accurate and reliable multi-physics simulations. BLUE Engineering has developed expertise in thermal control systems, lumped-parameter modeling, stochastic sensitivity analysis, robust design, and advanced optimization techniques. The company contributes to major international programs, including systems related to the European Space Agency and the International Space Station. BLUE Engineering collaborates with leading academic and industrial partners, including Leonardo, Thales Alenia Space, Avio Aero, and the University and Polytechnic of Turin. These partnerships enable

participation in strategic European aerospace research programs and the development of enabling technologies for future aeronautical and space systems.

The company is actively involved in Additive Manufacturing, focusing on simulation of printing processes, optimized lattice structures, material characterization, and virtual validation. These technologies enable significant weight reduction, improving efficiency, performance, and sustainability in aerospace applications.

Among the company's most innovative initiatives is LIW@Space (Living and Working in Space), a project aimed at improving livability in pressurized space environments. The project integrates modular ad-

ditively-manufactured structures, environmental monitoring sensors, plant-based air purification systems, and AI algorithms for biological control. BLUE Engineering holds two patents in this field, demonstrating its ability to transform research into tangible innovation.

Through the combination of multidisciplinary engineering expertise, applied research, and advanced simulation technologies, BLUE Engineering positions itself as a reliable partner for complex aero to the next generation of aeronautical and aerospace development platforms.



MEMORANDUM OF COLLABORATION

# THE “GOLDEN TRIANGLE” OF AEROSPACE IS BORN: PIEDMONT, LOMBARDY AND LIGURIA SIGN AN AGREEMENT

FROM THE NORTH-WEST ECONOMIC COUNCIL EMERGES A  
MACRO-REGIONAL HUB WORTH MORE THAN €15 BILLION.  
THE OBJECTIVE: TO CREATE THE CRITICAL MASS NEEDED TO  
LEAD EUROPEAN INNOVATION IN GREEN AVIATION,  
THE SPACE ECONOMY AND ARTIFICIAL INTELLIGENCE

As part of the collaborative process launched by the North-West Economic Council among the Piedmont Region, the Liguria Region and the Lombardy Region, a new strategic step to strengthen Italy's national aerospace supply chain was taken in Turin. In the evocative setting of the Castello del Valentino, in the Hall of Honour of the Politecnico di Torino, the Piedmont Aerospace Cluster (DAP), the Lombardia Aerospace Cluster (LAC) and the Ligurian district SIIT (Sistemi Intelligenti Integrati) signed a Memorandum of Understanding (MoU) aimed at consolidating and promoting the development of the Aerospace & Defence (A&D) industrial ecosystem at national and international level. The agreement was signed by Presidents Maurizio De Mitri (DAP),

Paolo Cerabolini (LAC) and Remo Giuseppe Pertica (SIIT), formalising an unprecedented collaboration among the three regions which, together, represent the driving force of Italy's aerospace sector. The initiative forms part of the process developed by the North-West Economic Council, the strategic forum between Piedmont, Liguria and Lombardy that in recent years has promoted dialogue and shared planning on key industrial sectors, from automotive to microelectronics, energy to logistics, and aerospace. The Regions of Piedmont, Liguria and Lombardy accompany and support the integration of their respective aerospace ecosystems, enhancing the role of districts as instruments of innovation, technology transfer and internationalisation for companies.

The three Districts represent an economic and technological colossus in aerospace. The three Regions account for over 60% of the national sector's turnover. Piedmont: €8 billion in turnover and 35,000 employees, the heart of engine production and space infrastructure; Lombardy: €6.3 billion in turnover, nearly €3 billion in exports, 22,000 employees, global excellence in fixed-wing (aircraft), rotary-wing (helicopters) and



space (satellites); Liguria: over €1 billion in turnover and 5,000 employees, a flagship for electronics, cybersecurity and integrated systems. The Protocol is intended to catalyse and strengthen initiatives supporting research and innovation in the aerospace sector, implemented in particular within the framework of the North-West Economic Council, the political-strategic collaboration initiated in 2019 between the Piedmont, Lombardy and Liguria Regions and formalised in October 2025. The Protocol's aerospace objective is to create a critical mass capable of competing on global markets, acting in synergy with the National Technological Cluster (CTNA). The three Districts commit to cooperate on fundamental pillars such as: Innovation and research: joint projects in green aviation, space economy, artificial intelligence and Industry 5.0; Internationalisation: joint participation in calls, trade fairs and global events to support local companies and start-ups; Human capital: coordinated actions for STEM education to raise youth awareness of careers in high technology; Security: focus on cybersecurity and advanced & urban air mobility to define new standards for urban flight.



**Maurizio De Mitri, President of DAP**, said with satisfaction: *"With this signature, Piedmont systemises its historic competences with those of our Lombard and Ligurian partners. The City of Aerospace in Turin becomes part of a macro-regional ecosystem unparalleled in Europe for the completeness of its supply chain. Today we shared the projects on which we are working. On the Aeronautics front, by 2030 we will work along two critical lines: Smart Materials, to develop functionalised materials with micro- and nanoparticles for electro-magnetic control of aircraft. This is not academic: it is the ability to make our aircraft safer and higher-performing. And the topic of Artificial Intelligence and Autonomy, the integration of AI algorithms for navigation of drone swarms up to 300 knots and the creation of adaptive learning platforms for pilots. We will transform simulators into systems capable of 'learning' from the trainee, optimising training. On the Space front we look beyond the atmosphere: we will address surface treatments for large space modules, protecting them from corrosion and extreme radiation. We will bring onboard Artificial Intelligence (Edge Computing) to make orbital operations and deep-space exploration autonomous. And finally GenAI: we are working on chatbots that will replace paper manuals for astronauts, providing instant decision-support during critical missions."*

**Paolo Cerabolini, President of LAC**, emphasised: *"This Memorandum of Understanding represents an important step in strengthening the capacity of Italian aerospace to act in a coordinated manner, leveraging different but highly complementary territorial competences. Lombardy brings to this collaboration a solid, specialised and internationally recognised industrial supply chain, with a significant presence in the aeronautical, helicopter, space and high-technology systems sectors. The agreement with Piedmont and Liguria allows us to pool experience, manufacturing capacity, research and strategic vision, creating more favourable conditions for the development of shared projects, access to new international opportunities and the strengthening of companies' competitiveness. For the Lombardia Aerospace Cluster this agreement confirms the value of collaboration among districts and the role of territories in building an increasingly integrated, innovative national supply chain capable of facing the major challenges of the aerospace sector."*

**Remo Giuseppe Pertica, President of SIIT**, declared: *"The Memorandum of Understanding among the three Districts, representing our three Regions, consolidates initiatives supporting research and innovation promoted by the North-West Economic Council, recently formalised. The aerospace component, in particular, will be strengthened by the synergistic contributions of public research and industrial entities operating in our territories."* Cristina Leone, President of the CTNA, concluded: *"Regional districts perform an essential role in enhancing territorial excellence in the various phases of research, development and commercialization of aerospace products. To increase the competitiveness of the entire Italian supply chain on international markets, since 2012 the National Cluster has been the reference point for active coordination of supply chains through the development of technological roadmaps and support for aerospace policies and strategies. The Memorandum of Understanding among three of CTNA's most active members confirms the potential of interregional collaboration and the need to take it to a concrete operational level. CTNA will support this collaboration and amplify its benefits through the dissemination of initiatives at the national level within its institutional activities."*

## FLIGHT4HEALTH

PROJECT CONCEIVED WITHIN THE ITALIAN ASSOCIATION OF CLINICAL ENGINEERS (AIIC)

# THE FUTURE OF MEDICINE TAKES OFF FROM PIEDMONT

The link between technological innovation in healthcare and aerospace exploration is closer today than ever before. Tangible proof of this convergence comes from Flight4Health, an ambitious project conceived within the Italian Association of Clinical Engineers (AIIC) and now the subject of a strategic collaboration with the Piedmont Aerospace District (DAP), which is about to be formalized through a program agreement. Officially presented in Turin during the 26th AIIC National Conference at the OGR, the initiative aims to combine the excellence of terrestrial clinical engineering with the frontiers of space and aviation medicine. While DAP and AIIC represent

the institutional and scientific pillars of this cooperation, the true engine and mastermind behind the project is DigiSky, a member company of the District. Driven and organized by DigiSky's CEO, who brings a significant professional background from the Clinical Engineering sector, the project took shape by bridging seemingly distant worlds. The goal is twofold: to study the human body's adaptation to extreme environments and, simultaneously, to develop enabling technologies for telemedicine and local healthcare.

The core of the experimentation is a specially equipped Piper PA32 aircraft, which simulates the stress and isolation conditions typical of both aviation and

space missions. The first scientific flights have already enabled real-time biometric monitoring of the crew, analyzing cardiovascular, musculoskeletal, and cognitive responses. This data is invaluable not only for understanding human physiology in orbit—where, as astronaut Paolo Nespoli recalled during the conference, biomedical experiments account for half of the activities aboard the ISS—but above all for transferring advanced diagnostic solutions “from the sky to the Earth” to benefit chronic or isolated patients. The project is poised for further development, thanks also to the recent activation of Leonardo Aeronautics' “FlyingLab”, for which DigiSky serves as the flight operator. Flight4Health demonstrates how the advanced expertise of Piedmontese SMEs is central to translating pioneering visions into practical industrial solutions. Thanks to DAP's ability to create synergies, the region confirms its status as a global hub of excellence in the Space Economy, capable of driving medical innovation far beyond the boundaries of traditional hospitals



WALTER CUGNO

VICE PRESIDENT OF THE PIEDMONT AEROSPACE CLUSTER

# FROM THE FACTORY TO THE SKY: PIEDMONT SUCCESS IN THE ARTEMIS II MISSION

In April 2026, NASA's Orion spacecraft, carrying a crew of four astronauts, successfully completed the Artemis II mission, flying around the Moon and ushering in a new era of human exploration. For the first time in over fifty years, humans traveled beyond Earth's orbit, reaching the greatest distance ever recorded in the history of crewed space missions. This historic milestone is one to which Italy—and Piedmont in particular—made a decisive contribution. The mission was made possible by Orion's European Service Module (ESM), provided by ESA and built by Airbus Defence and Space, with Thales Alenia Space Italy playing a key role. It is in Turin where the technological heart of the system beats: at the Corso Marche facilities, structural elements of the module, active and passive thermal control systems, components for water, oxygen, and nitrogen distribution, and micrometeoroid protection were manufactured—all essential parts for the crew's survival during their circumlunar journey. As noted by Roberto Cingolani,

outgoing CEO of Leonardo, space "is proving to be increasingly strategic for technological and industrial development." Indeed, the collaboration between NASA, ESA, and the Italian supply chain represents a tangible model of European synergy at the service of innovation and sustainability. An industrial and scientific ecosystem of the highest caliber revolves around Thales Alenia Space: the Piedmontese aerospace district, which brings together companies specialized in mechatronics, composite materials, electronics, and automation. These companies, alongside research centers and universities, contributed to the production and integration of Orion's subsystems, consolidating Turin's position as the European capital of Space Exploration. The success of Artemis II is only the first step. In the Turin laboratories, development is already underway for the Multi-Purpose Habitat (MPH)—the first lunar "home" for astronauts—and the European Argonaut lander, which will transport cargo to the lunar surface as part of future Artemis missions.

A significant role was also assigned to the Lunar Gateway, the space station destined for lunar orbit, whose development has been temporarily suspended to prioritize surface missions. However, Thales Alenia Space remains the leading industrial partner for the design of the pressurized modules, keeping the prospect of a permanent human presence around the Moon alive. Piedmontese workshops produce more than just mechanical components; they build the infrastructure for the exploration of tomorrow: habitats, life-support systems, and technologies that will enable a sustainable presence on the Moon and, one day, the departure for Mars. The success of Artemis II therefore bears the clear signature of Italian engineering and vision. And among all the stars that Orion journeyed past, one shines brighter than the rest: that of Piedmont, a symbol of industrial expertise capable of envisioning—and building—the future in space.

**STUDIO TORTA**

AVV. CLAUDIO COSTA - IP LEGAL ADVISOR

# NEW EU RULES FOR TECHNOLOGY TRANSFER

**O**n 1 May 2026, the new European Union Regulation No. 877/2026 on technology transfer agreements entered into force. It replaces the previous Regulation (EU) No. 316/2014 of 21 March 2014. The new regulation will remain in force until 30 April 2038. At the same time, the new Guidelines C/2026/2323 on technology transfer agreements entered into force, replacing the previous ones. The regulation lays down the conditions under which categories of technology transfer agreements falling within the scope of agreements restrictive of competition under Article 101(1) of the Treaty may benefit from the exemption provided by Article 101(3), as it is presumed that, in general, they satisfy the relevant requirements.

Without the regulation, companies would need to assess the compliance of their technology transfer agreements through a complex case-by-case evaluation; whereas the regulation provides a relatively more secure and defined legal framework, exempting entire categories of agreements that meet its requirements.

The new regulation does not substantially amend the previous 2014 regulation. In substance, it applies

to the licensing of technology rights for production purposes, while, for example, distribution agreements or research-and-development agreements are not covered, as they are governed by other regulations. Technology rights include know-how, patents, utility models, rights in designs and models, semiconductor product topographies, supplementary protection certificates for medicinal products, rights in plant varieties, and copyright on software.

Many of these rights, such as patents, know-how and software, are extensively protected by aerospace companies and constitute the subject of contracts that enable a broader circulation of technologies and the development of collaborations among companies in the sector. Moreover, they allow technology transfer from other sectors into aerospace, and vice versa, with mutual technological and competitive contributions and advantages. The regulation applies to agreements between only two companies. The duration of the exemption is provided for as long as the patents or other technology rights are in force, or the know-how remains secret.

The regulation exempts the agree-

ment provided that certain market-share thresholds are not exceeded and the agreement does not include certain restrictive arrangements, distinguishing between competing and non-competing companies.

In particular, to fall within the scope of the regulation, if the companies are competitors, the parties' combined market share on the relevant product and technology markets must not exceed 20%; whereas, if they are not competitors, each party's market share must not exceed 30%, thus providing more favourable treatment for agreements between non-competitors. Moreover, the agreement must not include the hardcore restrictions referred to in Article 4, in which case the entire agreement is not exempted, and must not include the restrictions referred to in Article 5, in which case the individual restriction is not exempted.

Agreements that do not fall within the scope of the regulation require a case-by-case assessment of compliance with competition law. In this regard, Guidelines C/2026/2323 provide the criteria for assessing the compliance of an agreement that does not fall within the regulation, as well as the crite-

ria for interpreting the provisions of the regulation itself.

In the aerospace sector, where large companies operate but also SMEs, the combination of the regulation and the guidelines constitutes a detailed legal reference framework, although sometimes not exempt from a certain degree of complexity, for the negotiation of technology transfer agreements.

The changes concern to a limited extent the text of the new regulation, where some additional criteria for determining market shares are specified. The main changes concern the guidelines and refer to data licensing, Licensing Negotiation Groups (LNGs) and Technology Pools.

Data licences were not the subject of specific regulation under the previous legislation, which, as seen, dated back to 2014. In recent years, the use and circulation of data have assumed dimensions of extreme relevance, particularly in the aerospace sector, where we see early and increasingly widespread use of big data and artificial intelligence. The guidelines acknowledge the difficulty of fully regulating this matter, since data can differ greatly in type and of legal protection. In summary: if data is protected by one of the technology rights governed by the regulation (for example know-how or patents), the regulation itself applies; if, instead, it concerns databases protected by copyright or sui generis rights, although not falling within the regulation, the European Commission will assess the agreement generally applying the same princi-

ples laid down in the regulation; in other cases, the assessment will be carried out case by case.

Regarding LNGs, which were not specifically regulated under the previous legislation, the guidelines provide guidance and directives. LNGs are agreements under which users of technologies agree to negotiate jointly the conditions of the licence. The guidelines highlight both positive aspects, such as the overall reduction of negotiation costs, and potentially negative aspects, such as collusive practices between competitors or excessive market power. The result is a new and complex discipline that requires a case-by-case assessment.

In relation to Technology Pools, the guidelines intervene, among other things, to integrate some provisions on the applicability of Article 101.1 of the Treaty and, in particular: to ensure that the technological rights included in the pool are effectively communicated to existing and potential licensees; to adopt sufficient measures to ensure that only

essential technologies are pooled and, for this purpose, to effectively communicate to existing and potential licensees the methodology used to assess essentiality; to license the technologies pooled by the pool to all potential licensees on FRAND (fair, reasonable and non-discriminatory) terms, while also avoiding so-called double dipping, that is, a double payment for the same licensed technological right.

In conclusion, aerospace companies operate in a regulatory context that is partly known and tested, but also in the presence of new matters that have entered European legislation on technology transfer,

and among these, data licensing with the related applications of artificial intelligence, a sector in which we must expect further innovations and future developments.



**FABRIZIO BRAGHINI**

# EUROPE'S NEW AEROSPACE ORDER

**T**he Berlin's withdrawal from the FCAS (Future Combat Air System) project, due to irreconcilable divergencies between Dassault e Airbus, is the landmark at the Berlin Aerospace Show, together with the convergence of other factors such as Berlin's willingness to assert itself as an international actor and assume leadership in European defence, backed by a significant increase of defence budget, against the backdrop of the conflict in Ukraine and the US reduction in Europe.

It is a rapidly evolving landscape that will characterize the redefinition of industrial alliances in Europe, where the swift occurrence of new developments is at the centre of ILA 2026 in Berlin. This year ILA is launched with an evocative title – Pioneering Aerospace – under the banner of technological evolution and acceleration in aerospace, driven by strong demand for de-

fence and security and emphasis on drones. ILA has been the showcase of German aerospace and defence industry, experiencing a long phase of growth in perspective as well. An industry aspiring, leveraging its heritage of competences and capabilities, to assume a leading role in Europe and to develop its own NextGen defence aircraft, as it's already the case for its traditional leadership factors, in the armoured and underwater domains.

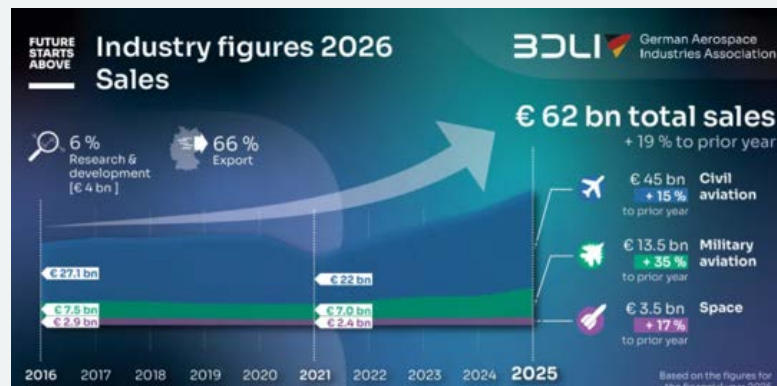
The most relevant sector is represented by civil aeronautics with revenues of €45 Bn largely by Airbus Deutschland by two third of the total, with its wide product portfolio including large liners and helicopters, Lufthansa Technik and MTU respectively with €9 and €6 Bn in maintenance and MRO, in addition to the supply chain for components and avionics. In prospect, Berlin's Ministry of Economy emphasised at the concurrent

Berlin Aviation Summit the willingness to negotiate for the national industry a "fair share" of the programme under study for an Airbus NGSA (Next Generation Single Aisle) for the replacement of the highly successful A320.

The Federal Government foresees a 10year rearmament plan of €377 Bn and an increase in overall expenditure to €625 Bn by 2030. The objective is to be by far the leading country in Europe in defence, surpassing the UK and France, nuclear powers in relation to which Berlin had a sort of subjection today reversed. In the same time Berlin continues purchases of extraEU equipment, for UORs, also under license, see Arrow from Israel and US see Patriot, F35A, P8A, MQ9B, Tomahawk, CH53G.



The announcement of the failure of the FrancoGerman FCAS while digital activities should continue, as well as technologies for UAS systems, has changed the prospects of European aerospace cooperations. The landscape is moving. Alternative and autonomous solutions for the development of a 6thGen aircraft have induced the major German companies, Airbus Germany, Autoflug, Diehl Defence, Hensoldt, MBDA, Liebherr, MTU Aero Engines, Rohde und Schwarz, to organise promptly in the Team Gen 6 initiative, aiming to involve Indra or a Spanish consortium and the Swedish Saab. The urgency to strengthen air defence could also see German participation in the GCAP. Many ideas and hypotheses have entered a complex and sensitive debate on potential new industrial arrangements. The scrap of FCAS is the latest of a series of crises between Berlin and Paris. Incidentally, Tom Enders had opposed the programme wanted by Merkel, preferring continuity with Italy



and the UK for the Eurofighter. Germany has participated with leading roles in European industrial cooperations, from Tornado to Eurofighter, from A400M to Tiger and NH90, but for years it has not developed autonomous military aircraft, even having the capabilities and competencies, a different choice compared to proprietary aircraft realised by Italy (M346 and AMX), Sweden (Viggen and Gripen), UK (Hawk). While some military cooperation with France are positive (e.g. MBDA, A400M, Space), the number of échecs is large, with abandoned programmes (FCAS, MAWS), withdrawn participations (Tiger Mk3) and in the past from Tornado and Eurofighter), suspended (MGCS), postponed sine die (CIFS), due to rivalries, division of competences, divergences on requirements and leadership. The other priority at ILA 2026 concerns the “drone dimension”

in all its components, driven by an effervescent international demand. Interest grows for the concept of cooperative combat drones or CCA, both for the wide range of models exhibited. Among several announcements of new products and initiatives, the new integrated antidrone air defence system with Defender missiles and highenergy lasers by MBDA is recalled; agreement between Airbus and Diehl Defence concerns cooperation in integrated air and missile defence. New products were presented, such as Diehl Defence's IRIST MK4 mobile air defence system and Helsing's CA1 Europa combat drone; cooperation with the Ukrainian industry was marked by the strategic alliance between Airbus Defence and Space and Skyfall in drones and rapid prototyping; Rheinmetall and Boeing Australia offer of the CCA MQ28 Ghost Bat, competing with Helsing's CA1 EA.

## NEWS AEROSPACE

# THE PIEDMONT AEROSPACE CLUSTER AND AEROSPACE.NRW SIGN A MEMORANDUM OF COLLABORATION (MOC).

The Piedmont Aerospace Cluster has taken a further step in its strategy of initiating extra-regional collaborations by signing a Memorandum of Collaboration (MoC) with AeroSpace.NRW, the aviation and space cluster of the German state of North Rhine-Westphalia, in Berlin during ILA Berlin Air Show held at the Berlin ExpoCenter Airport.

The MoC seeks to strengthen the civil and defence aerospace industrial ecosystem, support the acceleration of the transition to sustainable aviation, and create new international market opportunities for companies and research centres. The Memorandum of Collaboration (MoC) was signed by Maurizio De Mitri, President of the Piedmont Aerospace District, and Harald Cremer, Network Manager of AeroSpace.NRW (managed by NMWP Management GmbH on behalf of the Ministry of



*Harald Cremer, Mona Neubaur, Maurizio De Mitri*

Economy, Industry, Climate Protection and Energy of North Rhine-Westphalia), in the presence of the Minister-President of North Rhine-Westphalia Mona Neubaur.

## AEROSPACE FUNDING: SIMPLIFICATION IS KEY

A foremost question: how many different types of funds are related to the aerospace sector? Approximately over 60, most of them depend directly or indirectly on the European Commission (hereinafter EC). Aerospace is a strong strategic enabler with important cross-cutting impacts, characterized by numerous specificities, including high technological intensity and strategic importance, significant factors for EU policies. In order to approach the preparation of the proposals, it is necessary to understand the reasons and specificities of each fund, which in summary is an instrument of industrial policy. Each fund-program arises from initial considerations which, once consolidated, are channeled into fairly similar processes, for example white papers, green papers, roadmaps, consultations, policy papers, regulations, annual work programs.

Participation has a significant cost, particularly for SMEs, and unfortunately the success rate remains unsatisfactory, around 10 %.

With regard to Horizon Europe, Italy, in the period 2021-25, obtained about 4.5 billion euros,

ranking 3rd in terms of number of participations and fifth place in terms of financial return. EDF's last call performed much better, where the Italian Key Players were very successful, a little less so the SMEs overall.

We are in a pivotal situation. SMEs have to deal with critical aspects, such as heavy bureaucratic complexity, heavy administrative and financial management. With the Omnibus initiatives, the EC has tried to reduce complexity, announcing savings of 35% for SMEs and 25% for large industries, for an estimated total annual savings of about €6 billion. That is not enough, important simplifying revisions to the EU economic and financial regulations would be desirable. The EC considers SMEs to be important technological enablers and the turnover of large industries is attributable to around two-thirds of SMEs. If you want to safeguard the aerospace supply chain, you need to take charge of its specificities. The sector needs patient capital and derisking to facilitate the entry of private capital, favored by streamlined rules, continuity and stability.

**Giacomo Martinotti.**

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