GCAP Gains Momentum – But How Wide Will the Door Open?

In July 2026, Canada joined the Japanese-Italian-British Global Combat Air Programme – whose goal is to develop a sixth-generation fighter jet – as its first external partner, albeit only as an observer. Germany is also said to be increasingly interested in cooperation, while other nations have long featured on the list of potential candidates. In light of the programme's progress and other factors, including lessons learned from the collapse of a similar Franco-German endeavor, the question remains whether and how Tokyo, London, and Rome will expand the programme.

Progress of Trilateral Cooperation

The Global Combat Air Programme (GCAP) was established in 2022 as a merger of two next-generation combat aircraft projects – the British-Italian Tempest and the Japanese F-X programmes – with the goal of introducing a sixth-generation fighter jet by 2035 to replace the Eurofighter Typhoon in the UK and Italy, and the Mitsubishi F-2 in Japan. The fact that these three partners would join forces in a single project was not obvious from the outset, and the initiative evolved from a series of failed negotiations and partnerships. Japan originally considered collaborating with the United States, while the UK conducted early exploratory work on a new fighter with Sweden.

In December 2023, trilateral cooperation was sealed with the signing of an international treaty establishing the GCAP International Government Organisation (GIGO) to coordinate the program.[i] In 2025, a joint venture company named Edgewing was launched, comprising the three primary industrial partners responsible for developing GCAP: BAE Systems, Leonardo, and Japan Aircraft Industrial Enhancement. Although financial hurdles seemed to stand in the way – such as a threefold increase in Italy's contribution costs up to $21.8 billion or delays in the approval of GCAP funding by the UK government – the founding countries continue to advance the project. According to plan, the first flight of the fighter demonstrator is set to take place in 2027.

New Participants and a Lack of Competition

It can be said that the cooperation is not merely continuing, it is expanding. In July 2026, Canada became the first external partner to join the program. However, it did not enter GCAP as a full member, but as an observer. This means that for now it will not participate in the development work, but has the right to monitor progress and take part in classified consultations on the development of new capabilities and technological cooperation.[ii] Ottawa's decision to join should be viewed through two lenses. It does not yet commit to purchasing aircraft in the future, but it wants to keep several options open. This aligns with its strategy to diversify defence-industrial relations and move away from reliance on US arms imports. It is worth recalling that following a deterioration in relations with the US in 2025, Canada began considering replacing part of its order for American F-35s with a contract for Swedish Gripen E fighters. The second dimension is strictly industrial – GCAP involvement opens up opportunities for Canadian defence companies to collaborate and, consequently, expand the industrial base in Canada. This goal has been reflected in concrete steps: 28th October 2026, the Canadian company Bombardier signed a Memorandum of Understanding with BAE Systems for cooperation on next-generation air combat capability support technologies.[iii]

Other nations are also taking an interest in the programme. In July 2026, reports emerged that Singapore had begun preliminary talks on potentially joining GCAP, with Saudi Arabia and Germany also on the list. There were even reports circulating that Poland had received unofficial approval from the programme's founders to participate as an observer.[iv] The root of this interest in the British-Italian-Japanese initiative lies in the fact that it represents the best, if not the only, realistically available option for nations seeking access to sixth-generation fighter technology. There are already several sixth-generation combat aircraft programmes worldwide. China is conducting advanced work, but this option remains entirely inaccessible, particularly for Western nations. Until June 2026, three projects were being undertaken among Western countries: GCAP, the American NGAD (Next Generation Air Dominance), and the Franco-German-Spanish FCAS (Future Combat Air System). Like other sensitive and critical technologies, NGAD is strictly guarded. The Americans will not permit foreign partners to join, and it is possible that – just as with the F-22 Raptor air superiority fighter – exports of the F-47, the planned model delivered by NGAD, will be prohibited. Meanwhile, FCAS was officially terminated by France and Germany in June. The project had long been weighed down by strategic vision divergences and disputes

between Dassault and Airbus over programme control, access to sensitive technologies, intellectual property, and distribution of future revenue.[v]

Ambitions and Concerns

As a result, the Global Combat Air Programme has emerged as the sole sixth-generation fighter project open to third-party participation. Following the failure of FCAS, Germany began looking toward GCAP as an alternative, and Canada's joining likely further encouraged Berlin to pursue talks with the GCAP founding nations. During a visit to Japan, on 28th October 2026, the German Chancellor Friedrich Merz expressed Germany's interest in engaging with the venture and stated that Berlin is exploring its potential role. Therein lies the problem. It is worth noting that while Japanese Prime Minister Sanae Takaichi spoke during a press conference about defence-industrial cooperation with Germany in areas of mutual complementarity, she made no direct mention of GCAP.[vi] Unlike the UK, which invited Germany to join the project to share costs and lower unit prices through higher production volumes, Japan remains skeptical of German participation.

Tokyo is notably not opposed to Berlin joining as an observer. However, Germany has much more ambitious plans and seeks talks on close industrial and technological cooperation. Merz was accompanied in Japan by representatives of Airbus, and according to the *Financial Times*, the company itself is set to discuss participation in research and development with BAE Systems soon. Japan's concerns center on the risk of schedule delays and the necessity of renegotiating the division of work among partners.[vii] For similar reasons, Tokyo was not enthusiastic about Saudi Arabia's potential participation a few years ago, placing its stance at odds with London and Rome. Nevertheless, all three GCAP founders agree on enhancing cooperation with "like-minded" nations and seeking future export markets for the sixth-generation fighter.

Conclusion

While the UK and Italy are more open to deeper involvement from new partners bringing additional financial resources and technological expertise, Japan – for whom maintaining the current schedule constitutes a priority – approaches the matter with caution. All three have

undoubtedly observed and are currently analysing the collapse of the FCAS program. Tokyo, Rome, and London will need to strike a compromise and maintain political cohesion so that internal disputes do not overshadow actual cooperation and the primary goal of building a sixth-generation fighter on schedule. The GCAP project remains highly attractive to other nations, and its further expansion will likely depend on the expectations of candidates, the needs of existing participants, and progress across the overall endeavor.

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