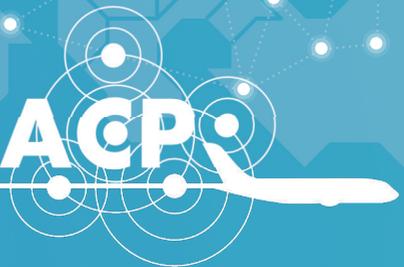


EUROPEAN
AEROSPACE
CLUSTER
PARTNERSHIP

STRONGER TOGETHER

connecting aerospace clusters

EACCP





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CELEBRATING 10 YEARS EACP

The European Aerospace Cluster Partnership (EACP) was launched by the City of Hamburg in 2009, as part of a European co-funded project.

The objective was to encourage exchanges of experience and support the implementation of concrete pilot projects that would promote cluster innovation and development. Since then, the EACP has grown into a permanent partnership of more than 40 aerospace clusters located across Europe.



The EACP has experienced strong growth over its first 10 years and now includes 45 aerospace clusters located in 18 European countries. These clusters represent more than 5,000 companies, 450 research institutes & universities and 200 public bodies. The EACP now serves as a focal point for organising direct exchanges between virtually all of Europe's aerospace regions, with various groups of clusters collaborating on a wide range of projects under the EACP umbrella. Simultaneously, the EACP has strengthened its position as the leading aerospace network in Europe and is rapidly becoming a one-stop communication path between European institutions and the many thousands of SMEs that play such a crucial role in the future of the aerospace industry in Europe.

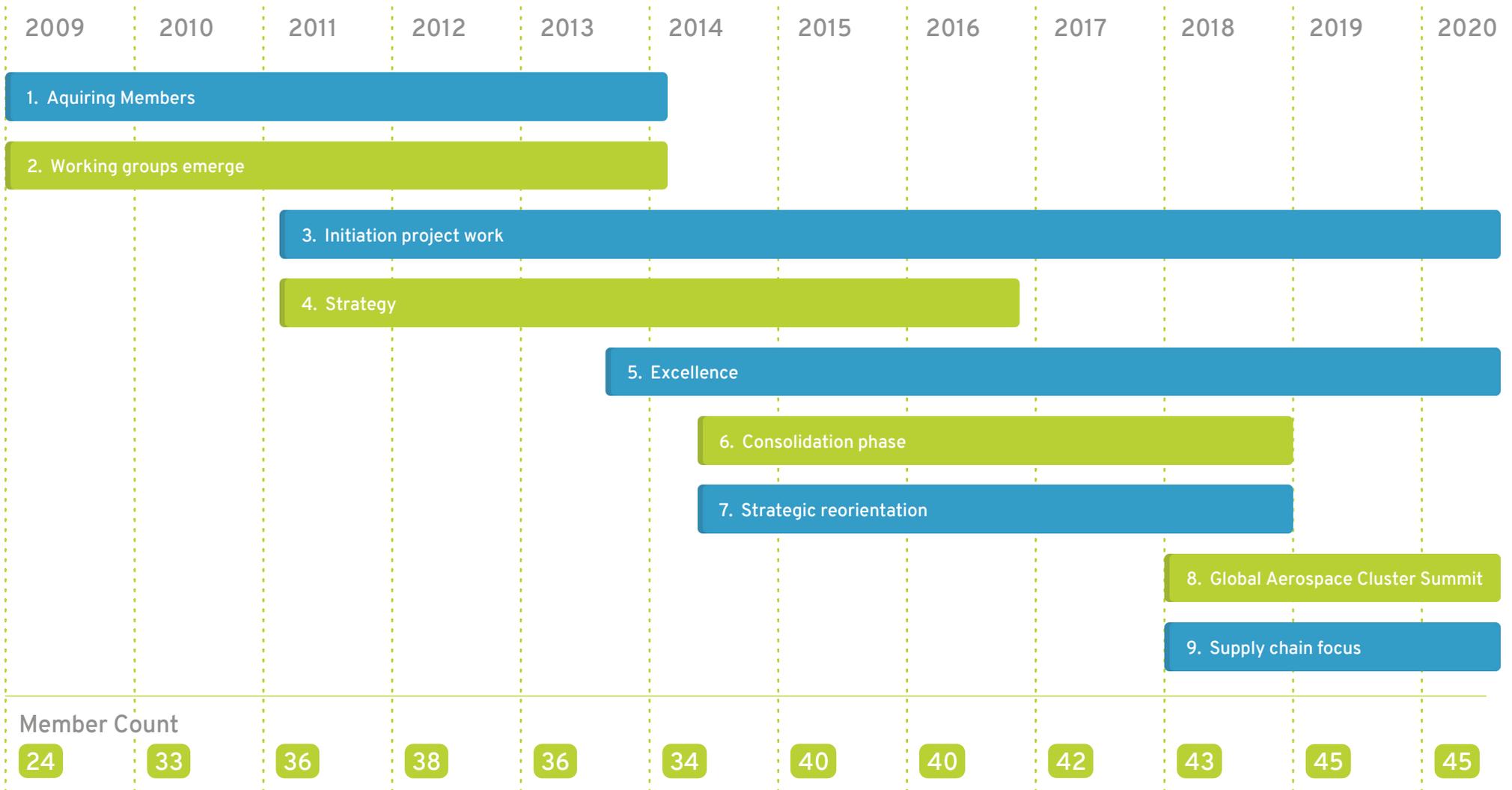
Thus the EACP grows stronger year by year, gaining new members from regions across Europe, working hand in hand with the European Union, and undertaking diverse roles in a whole series of Europe-wide and international projects. The EACP and all its members are confident that the next 10 years will be equally fruitful, as we grow stronger together by sharing knowledge, fostering business growth, supporting innovation, and strengthening relationships!

THE AEROSPACE INDUSTRY

Whilst long-term growth forecasts for the aerospace industry are generally positive, the sector is currently experiencing profound changes. With new players such as China, Japan and Russia entering the market, global competition is steadily intensifying. Furthermore, there is a constantly growing focus on green technologies, which will shape the future of the industry through new mobility concepts and reduced-emission products.

Sustainable success can only be achieved by companies and institutions that excel in developing and implementing innovative product and service offerings, which contribute to the needs of the airlines and airports that make up the world's aviation industry. This is where the EACP comes in. With a strong foundation based on experience and mutual trust, a whole series of collaborative activities across the EACP membership are now supporting Europe's aerospace industry to meet the needs of the global community at even higher levels.

OVERVIEW OF EACP DEVELOPEMENT



ABOUT EACP

The EACP is a network of European aerospace clusters that has the purpose of sharing experience and supporting the implementation of collaborative projects.

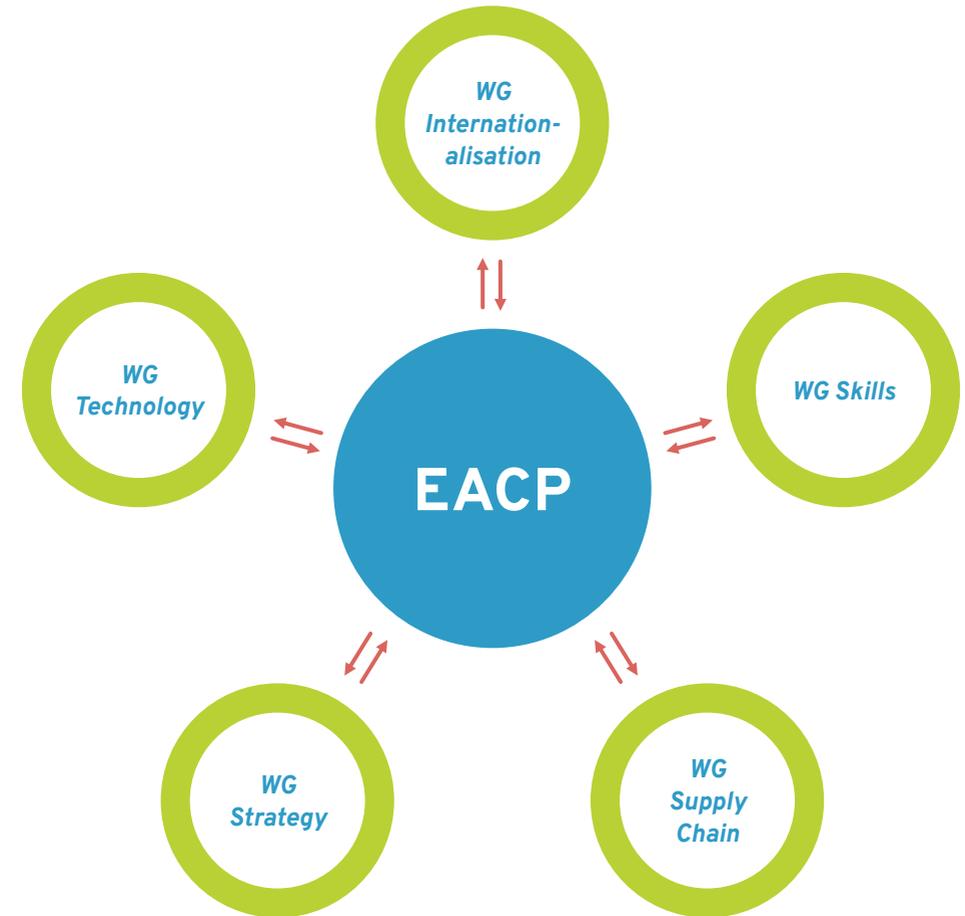
The EACP initiates and maintains a high level of active exchange of information and knowledge among all network partners. It develops and delivers concrete actions that enhance long-term transnational cooperation between clusters and companies and thus promotes a stronger and more competitive European position in the worldwide aerospace markets.

The EACP is organized as a partnership based on Letters of Intent. It provides the opportunity for each member cluster to participate in one or several working groups (WG), that develop and deliver collaborative projects together, all aimed at solving common challenges and contributing to

the development of each member cluster. The various joint activities boost the performance level of the participating clusters as well as their regional economies as a whole.

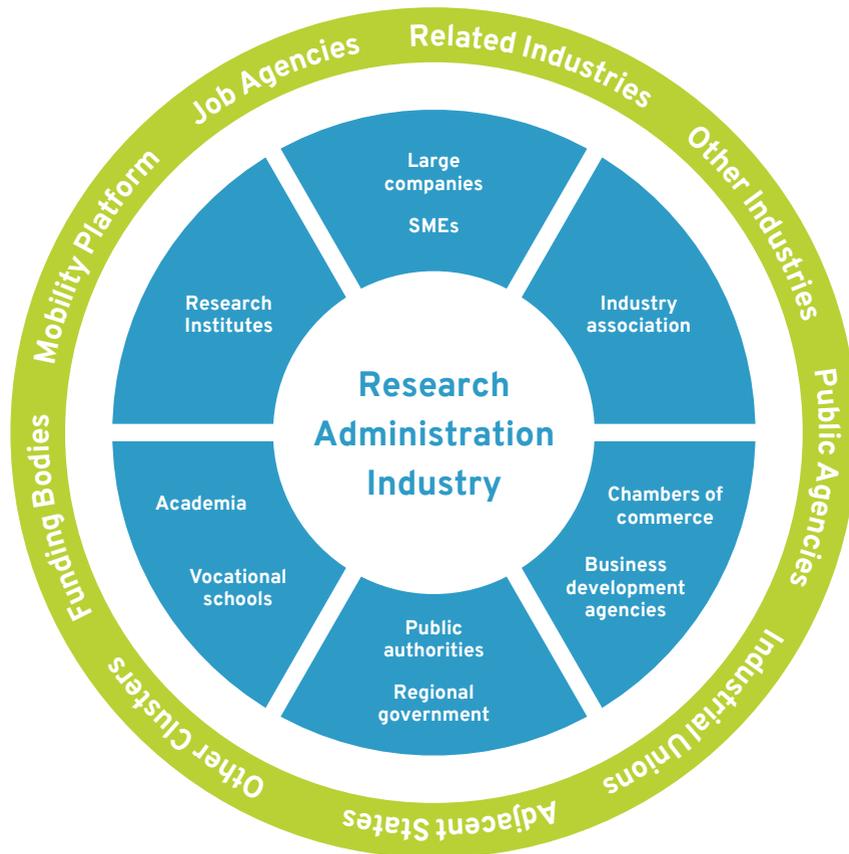
The EACP is organized in an informal, decentralized manner allowing flexible communication and decision-making processes. Central to the organizational structure of the EACP are its five working groups: Strategy, Internationalisation, Technology, Supply Chain and Skills.

The network as a whole is coordinated by Hamburg Aviation e.V.



OUR PURPOSE

In order to successfully compete on the global level, Europe needs to work hard to boost its innovative and competitive capabilities and potential.



Enhancing collaboration among regions and industry clusters play a key role, especially when it comes to SMEs. The EACP now provides a permanent platform for mutual exchange, policy learning and cooperation; all designed to achieve the highest level of performance in each European aerospace cluster and the network as a whole. With this ambition clearly in mind, in only a few years the EACP has gained a deserved reputation as an excellent platform for exchange of experience concerning solutions required to address the various challenges the partners face individually and collectively.

THE COMMON GOAL

By establishing closer relationships between aerospace clusters as a foundation for delivering added value to the wider aerospace sector, the EACP is shaping relationships among players, industry stakeholders and policy makers across Europe. Furthermore, with its strong focus on

innovation and competitiveness, the EACP and its members are contributing to strengthening Europe's strategic position in global aerospace markets.

STAKEHOLDERS REPRESENTED WITHIN EACP

EACP membership is open to aerospace cluster organisations in member states of the European Union and adjacent countries. In order to be admitted to the network, the cluster body must represent all segments of the regional aerospace sector, including industry, research institutions and administrative organisations. The main focus of EACP clusters is expected to be on civil aviation – the development and manufacture of passenger aircraft - with a minimum of 60% of economic activity in this sector. Of course in most clusters there are also strong overlaps with defence aerospace, the space industry and the aviation sector.



EACP

Unity Through Diversity

Global Competitiveness

Trust and Engagement

Mutual Exchange

Sustainable Cooperation

Joint Value Creation

Since its inception, the EACP has been based on a set of core collaborative values which shape the culture and define the character of its transnational work.

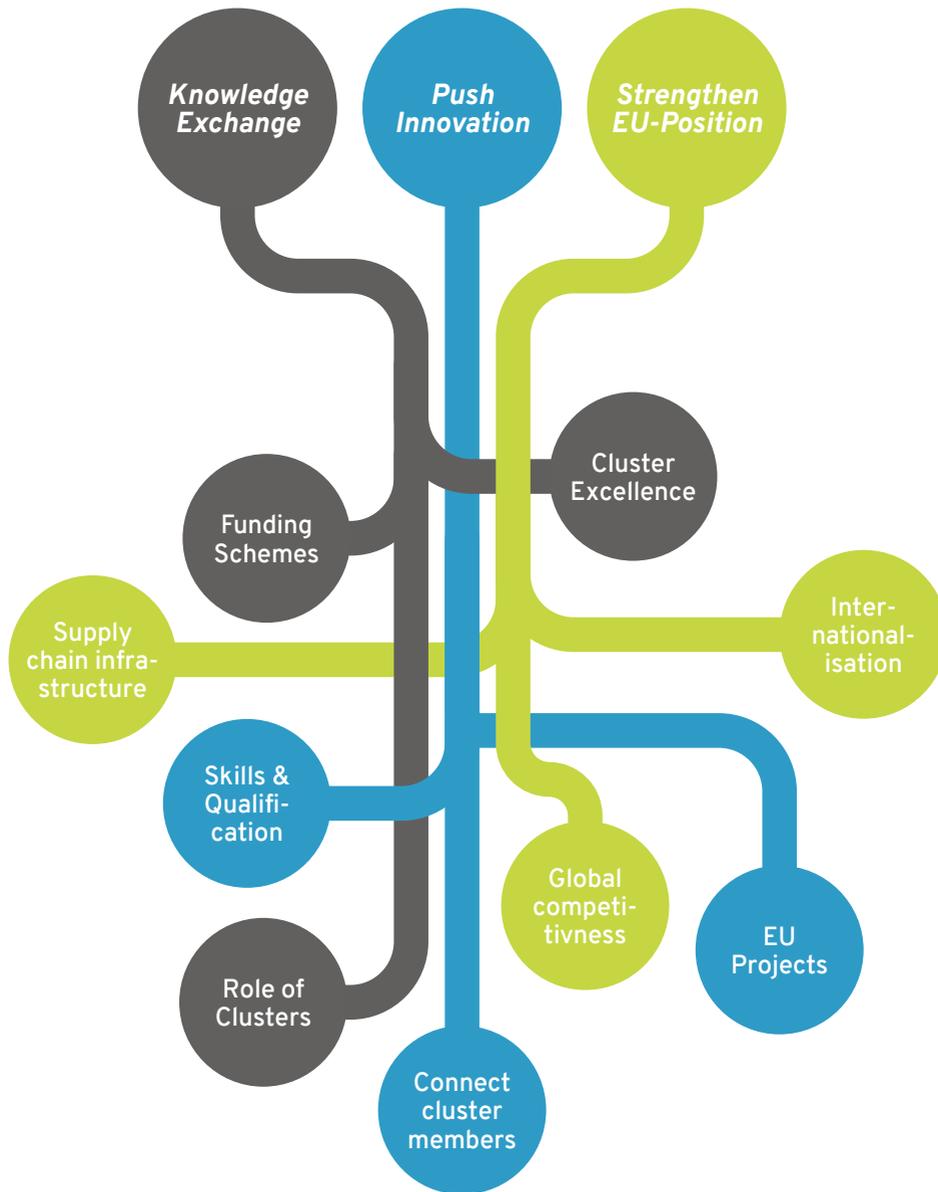
EACP collaboration only succeeds because of deeply embedded core values of trust, engagement, dependability and joint added-value generation, allowing the EACP to function as a network based on respectful plurality and mutual commitment.

As the most active aerospace collaboration platform, EACP provides a permanent framework for information exchange and policy development as well as opportunities for transnational cooperation between the cluster bodies and all actors in the aerospace industry. Focusing on European clusters, the EACP is able to look outwards, shaping the future trajectory of

international cluster relations whilst simultaneously acknowledging that each constituent European aerospace cluster will have its own needs, challenges and characteristics.

In a global context EACP strives to position Europe as the leading centre for innovation and competitiveness in the aerospace industry, vigorously addressing the contemporary challenges of an increasingly globalised world. The EACP truly embodies the cooperative values and close interactions that enable its vision of strengthening the whole through the diversity of the many.

OBJECTIVES



In the context of inter-cluster knowledge exchange, EACP members regularly hold discussions of best practice cluster policies.

More broadly, participation in the wider European Strategic Cluster Partnership (ESCP) allows exchange of experience and knowledge regarding economic, political and social developments that affect aerospace and other industry sectors.

PUSH INNOVATION

The second main objective is pursued by creating the policy frameworks that will enable the development of technical and social innovation.

Examples include the Skills Hub project as well as the establishment of projects which specifically target technological innovation, such as the CARE, BeAware or EuroSME. These and other projects are supplemented

by EACP match-making events, when EACP brings together actors from industry and research communities to develop new ideas needed to improve technologies, products and processes.



The third main objective is the development of globally competitive aerospace supply chains across Europe's regions.

Strategic assessments of future technological developments as well as collaborations with strategic actors are required. Here EACP also supports the efforts of other institutions operating at the European scale such as ASD (AeroSpace and Defence Industries Association of Europe), ACARE (Advisory Council for Aeronautics Research in Europe), CleanSky, EASN (European Aeronautics Science Network), SESAR (Single European Sky ATM Research Programme) and EEN (Enterprise Europe Network).

- | | | | | | |
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THE EACP STRENGTHENS THE POSITION OF THE EUROPEAN AEROSPACE INDUSTRY IN THE WORLD MARKET.





WORKING GROUP INTERNATIONALISATION

This EACP working group has essentially two objectives:

1. Identifying international cooperation opportunities for the aerospace companies that make up our clusters, especially the SMEs, and 2. Developing a global network of aerospace clusters. These activities obviously are strongly linked given that cooperation between European clusters and their international counterparts plays a significant role in identifying new opportunities for companies to cooperate.

The ongoing search for opportunities to cooperate covers both private companies (mainly SMEs) and also academia; through exchange of students or joint collaborative R&D projects. As a result, many EACP cluster managers have now established solid personal contacts with

partners in North and South America, Asia, Africa and the Middle East. The joint presence of EACP cluster representatives at international airshows or business conventions enhances the awareness of the EACP network in these countries. One of the direct benefits is that SMEs from any EACP member cluster are given opportunities to participate in outgoing international missions led by other EACP cluster bodies. SMEs as well as other regional cluster stakeholders can also benefit from the knowledge the network itself has developed in identifying and setting up new contacts with international actors.

To support these international activities, EACP member clusters have participated in European funding programmes including

Horizon 2020, COSME, Erasmus+ or Interreg. The EACP projects CARE and EACP-ABROAD are examples of a successful implementation of funded European projects to support our international networking activities.

EACP will continue to foster these global partnerships, and will seek to extend them to include both enhanced cooperation with other European aerospace stakeholders and increased visibility and impact for the EACP network itself.

GAC SUMMIT

Since 2017, the EACP annually organises the Global Aerospace Cluster Summit to bring together aerospace cluster managers from around the globe.

Coordinated by the EACP Internationalisation Working Group, these half-day events are held to coincide with major international aerospace trade shows. The Summits have enjoyed a high level of international

recognition and participation among cluster managers from around the world, representing organisations ranging from Aéro Montréal to the Aichi Prefectural Government and the Malaysia Aerospace Industry Association.

The meetings enable the international community of aerospace clusters to share best practice experiences in supporting SMEs and to learn about the development of the aerospace industry in regions across the globe. Summits start with keynote presentations by top aerospace industry experts. The programmes continues with project presentations and in depth group discussions to help European and international cluster managers learn from how their peers are addressing some of the common challenges they face.



LEARN & FLY

Learning materials and support tools to foster engagement of students in science subjects and aeronautics-related careers.

The EACP Skills Working Group focuses on supporting EACP clusters to align skills and training strategies with sectoral strategies for aerospace.

The group aims to bring together best practices in the human sciences in the aviation sector, and to enhance the human capacity of the sector to integrate highly productive and often disruptive technologies, products and processes. The goals of the WG Skills: Aligning master's degrees and PhD theses with industry research needs; raising awareness of aerospace professions in students through specific programmes and best practice exchanges; promoting human resources best practices for SMEs; identifying the skills issues that are key factors in the

development and integration of technological products; and fostering the importance of good skills policies for SME entrepreneurs. Members of the WG Skills are helping to create a working model which integrates product and skills analysis, boosting science skills that have aerospace specializations and fostering open skills mind-sets. One example is the group's engagement in the European Mobility Hub project, focused on linking students with companies for curricular and summer internships.

The project Learn & Fly has two complementary objectives. On the one hand it aims at addressing underachievement in the basic skills of maths, science and literacy through more effective, innovative teaching methods using the world of aeronautics as an inspirational theme. On the other hand it aims at supporting schools (especially teachers) to tackle early school leaving (ESL), by providing information and materials about career opportunities in the aeronautics field and different education/training paths available to embrace these.

The Learn & Fly project was born out of a typical EACP

approach; gathering information, exchanging experiences and developing a structured approach that would benefit all parties at local and international level, creating a legacy of valuable tools for future application by EACP members. An innovative aspect of Learn & Fly is the way it encapsulates different initiatives (STEM Kit, teachers training, careers Kit, competition), addressing different groups (pupils, teachers, parents, counsellors, companies, universities), yet integrated in a coherent strategy that both benefits from international experience and is effective at getting local stakeholders involved.



WORKING GROUP STRATEGY

The Working Group Strategy operates the high-level strategic framework for the EACP:

ensuring we are learning from the many diverse EACP projects and their results, broadening our knowledge base and disseminating key results;

fostering the right culture of collaboration across EACP members to help them generate sustainable and competitive European value chains;

working to ensure that future European, national and sub-national support programmes are designed in line with the needs of the whole aerospace industry;

developing strategic collaboration with other European stakeholders;

helping strengthen the EACP organization internally to provide professional and effective support and benefit to EACP members.

RUE AERO

Reaching Up to Excellence in Aerospace Cluster Management

RUE AERO stemmed from a European Strategic Cluster Partnership action. The project provided the means, roadmap and drumbeat to improve the quality of EACP members' cluster management, supporting partners in the consortium to progress to higher levels of - officially recognised - cluster excellence.

The project was based on strengthening inter-cluster collaboration among EACP

members. Project partner organisations exchanged information about their current menu of services to support aerospace supply chain SMEs. The resulting portfolio of good practices provided a pool of ideas to the project partners, which were then able to further strengthen their cluster management excellence by picking the most transferable and best actions to implement in each cluster.



WORKING GROUP SUPPLY CHAIN

THE SUPPLY CHAIN WORKING GROUP AIMS TO SHARE KNOWLEDGE AND BEST PRACTICE FOR IMPROVING THE PERFORMANCE OF THE EUROPEAN AEROSPACE INDUSTRY'S SHARED SUPPLY CHAINS.

It does so by developing the capabilities of cluster managers to work together across Europe and share best practice in support of their regional supply chain companies in the areas of skills, innovation and business improvement. The group recognises that there are significant opportunities to learn from each other in how we support companies to develop their businesses and improve their performance to their customers in terms of the quality, cost and delivery.

A number of European, national and regional business support programmes have been developed in different aerospace clusters. Learning from and comparing these gives the Supply Chain Working Group the opportunity to benchmark both how these programmes are delivered most effectively and the resulting improvement in performance of supply chain companies; all with purpose of understanding how EACP members can best improve the overall performance of Europe's aerospace supply chains.

NATEP

National Aerospace Technology Exploitation Programme

One example of a project that has been designed and developed by a group of clusters for companies in the aerospace supply chain is the UK's NATEP (National Aerospace Technology Exploitation Programme).

The NATEP programme has been supported with over £40 million of UK Government funding to help UK supply chain companies develop more than 100 novel technologies. It is also enhancing UK supply chain capabilities and networks and enabling them to

deliver high added value to future aerospace products and services and increase their ability to win new business with higher tier companies anywhere in the world.

NATEP was originally conceived by the Midlands Aerospace Alliance which with the North West Aerospace Alliance, West of England Aerospace Forum and Farnborough Aerospace Consortium and the UK's national trade association ADS created a technology support programme that could be delivered simultaneously and in a coordinated way by the regional aerospace cluster bodies.

NATEP is a structured process to encourage the exploitation and positioning of new product or manufacturing technologies emanating 'bottom up' from aerospace supply chain companies. The project funds the development of new technologies by small partnerships of SMEs and mid-cap business units with customer participation and advice. The clusters provide expert support in R&D management, technology strategy planning, partnering and how to foster effective collaboration for the long term.

NATEP is an ideal example of the type of project developed by a number of regional aerospace cluster organisations working together that could be developed as an exemplar for the wider European aerospace supply chain.

WORKING GROUP TECHNOLOGY



Connecting technology centres of excellence with EACP cluster SMEs and sharing available databases is a main goal of the Technology Working Group.

Creating a European map of technology centres of excellence and universities according to their competitiveness and competences in order to create a technologies database;

Utilizing existing databases of technology competencies for SMEs looking for solutions;

Monitoring European (and national) research programmes, identifying the innovation challenges and creating a link for

matchmaking between technology offers and SME needs;

Guiding EACP members to help small companies in their clusters to find the right partners for working on technical R&D projects focused on solving our industry's common challenges (pollution, fuel efficiency, production costs, etc.);

Setting up specific strategic projects that meet SME needs to be proposed to EU programme calls.

EACP- EUROSME

*aErospace inter-clUster
smaRt specialization
actiOns for SMEs
competitiveness in the
circular economy approach*

The EuroSME project aims to stimulate the cooperation between clusters that come from differently developed regions. To develop collaborative paths and to exploit their complementarity the developed partnership strategy provides a solid basis to continue the common work among the EuroSME project partners. With the definition of common interest areas by the opportunity map, strategic goals, a roadmap and C2C and B2B activities the strategy paves the way for a well-

coordinated collaboration between all partners. The strategy process reveals that the most promising higher-ranked topics to follow are “Aircraft of the future”, “Industry 4.0”, “Observation Technologies” and “UAV”. These four topics are the output of the opportunity map and indicate the most promising areas of common interest between the projects partners. First matchmaking activities between SMEs and webinars have been successfully implemented.



FURTHER EACP PROJECTS

BEAWARE

The BEAWARE (Bridging East and West for Aerospace Research) consortium connected aerospace clusters and support organisations in Western Europe (France, Germany, United Kingdom, Spain and Italy) with rapidly evolving aerospace clusters and strongholds in Eastern Europe (Poland, Romania, Czechia, Slovakia and Baltic States). The project created the necessary conditions to utilise existing strengths and emerging potentials in the field of aeronautics and air transport for a sustainable contribution to wider European aerospace programmes and projects.

CANNAPE

CANNAPE was a European Coordinating & Support Action (CSA) project with a consortium composed of aerospace R&D stakeholders from both Europe and Canada. The results of CANNAPE enabled a deeper and longer period of collaborative R&D in critical areas of aeronautics. For instance, the Canadian industry is now in a better position to participate in European aerospace R&D programmes.

CARE

(Clean Aerospace Regions) was a three-year European CSA project to foster greener aviation and related research and development activities. The project created a CARE TECH Platform, a dedicated process designed to screen future European funding calls and established CARE think tanks called “TIGER groups”. These actions have supported the development of green technologies that will be key competitive advantages in future air transport systems.

ABROAD

While internationalisation has always been a relevant topic for the EACP, the strategy behind ABROAD was for EACP partners to better network with specific target aerospace regions world-wide and

offer SMEs even better support in their internationalisation efforts. A new approach was thought to be crucial because clusters vary immensely in size and capacity. Working together -- sharing links, relationships and knowledge -- is the only way to effectively and efficiently identify new partners from target regions around the world for regional SMEs. ABROAD therefore deepened and shared existing links between individual EACP clusters and specific foreign regions with the object of inserting European SMEs into new international value chains or supporting the emergence of new international research and development collaborations.

CLASSIC

(Clusters of Aerospace Suppliers Share Innovation Capabilities) was a project supported by the H2020 Innosup 5 programme. The purpose was to benchmark good practice in how aerospace clusters help SMEs become more innovative and develop new technologies. CLASSIC identified a series of dimensions that defined how SME innovation support programmes can be designed. The model was shared with EACP members so they can develop better local innovation support programmes based on best practice ideas.

CLUSTER INDEX

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