



EUROPEAN
AEROSPACE
CLUSTER
PARTNERSHIP

STRONGER TOGETHER

connecting aerospace clusters



EACP

EUROPEAN AEROSPACE
CLUSTER PARTNERSHIP





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CELEBRATING MORE THAN 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 since its beginning 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 a crucial role in the future of the aerospace industry in Europe.

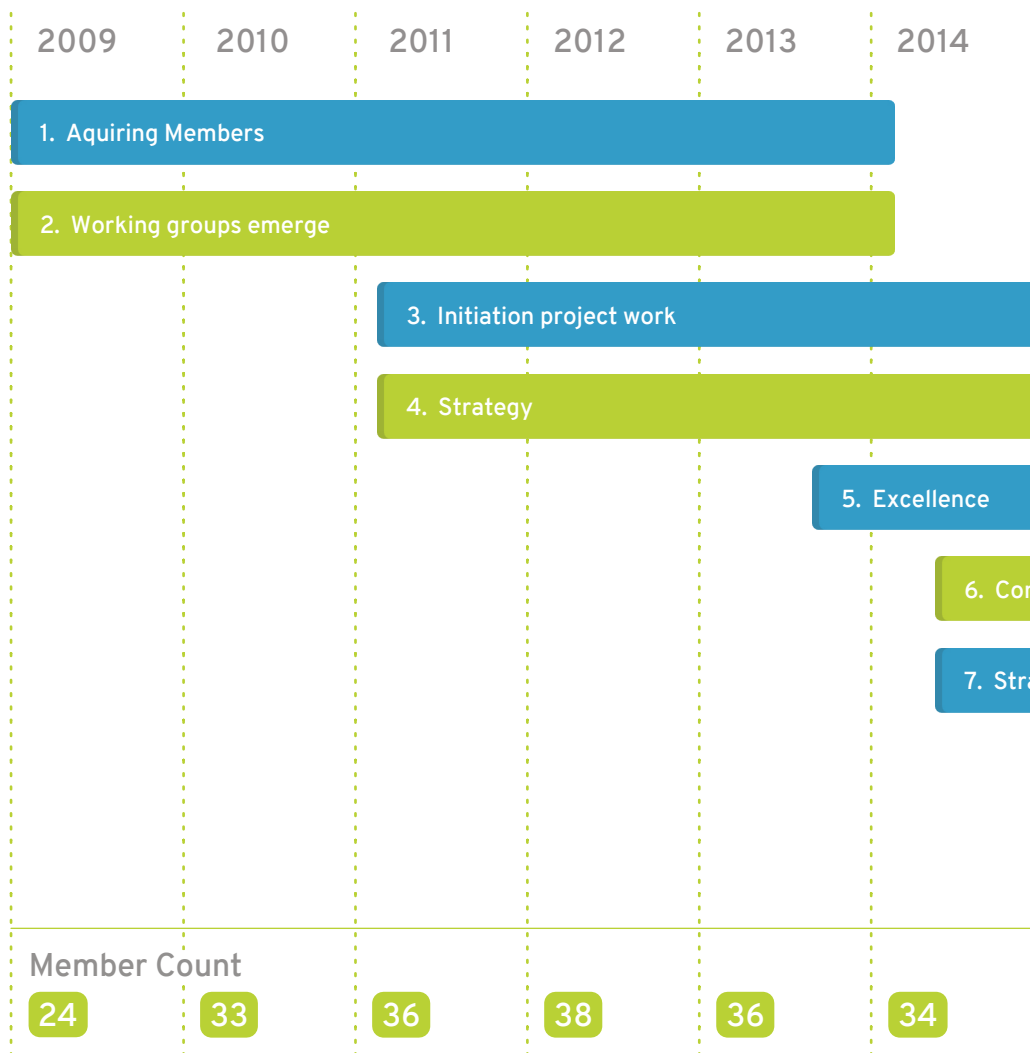
Thus the EACP grows stronger year by year, gaining new members from regions across Europe, working hand in hand with the European Union, and undertaking diverse roles in a whole series of Europe-wide and international projects. The EACP and all its members are confident that the next 10 years will be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

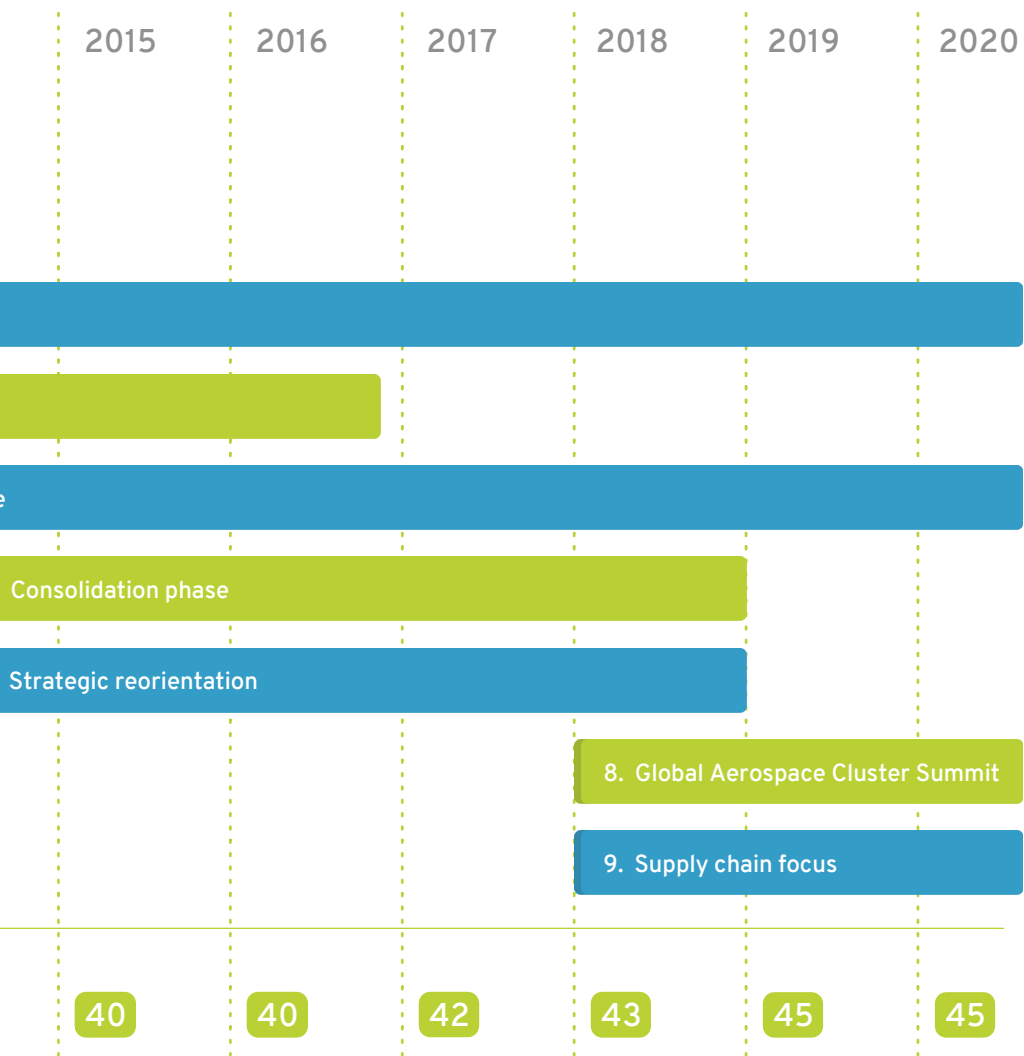
THE AEROSPACE INDUSTRY

Whilst long-term growth forecasts for the aerospace industry are generally positive again after the Covid pandemic, the sector is currently experiencing profound changes. With new players 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 is now supporting Europe's aerospace industry to meet the needs of the global community at even higher levels.

OVERVIEW OF EACP DEVELOPMENT





ABOUT EACP

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

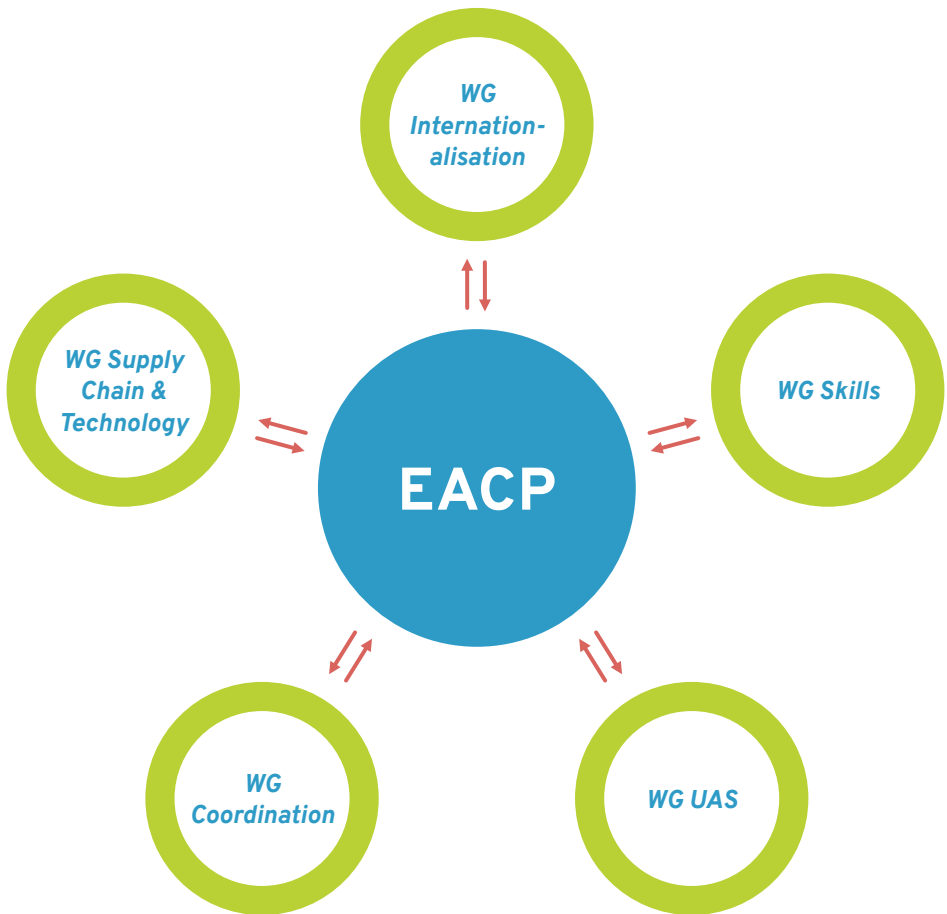
The EACP initiates and maintains a high level of active exchange of information and knowledge among all network partners. It develops and delivers concrete actions that enhance long-term transnational cooperation between clusters and companies and thus promotes a stronger and more competitive European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

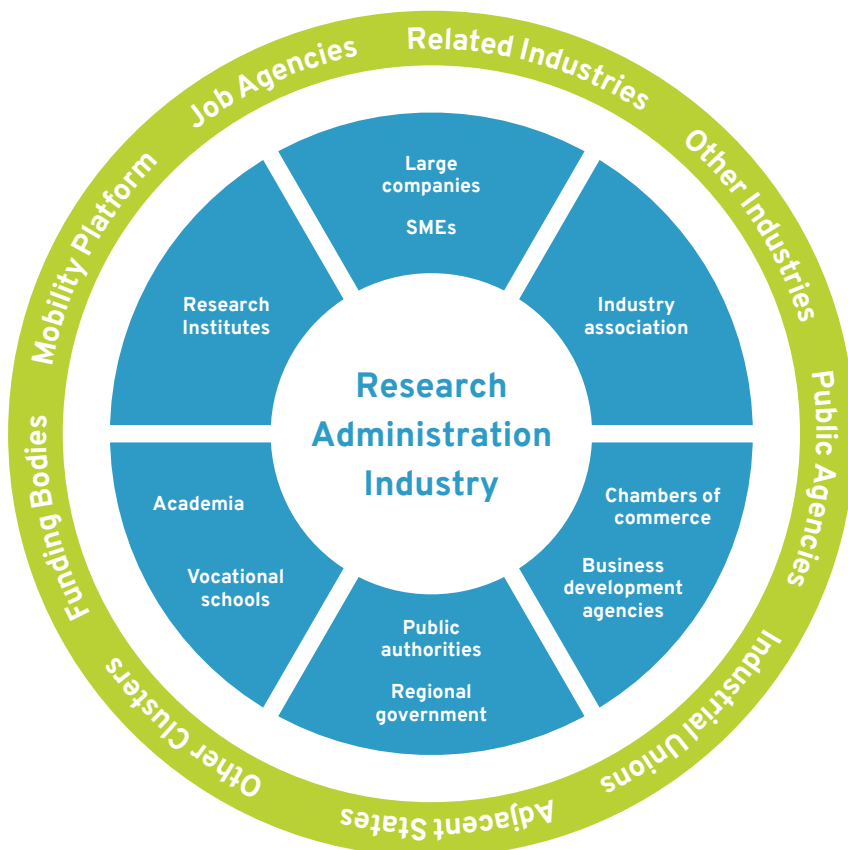
The EACP is organized in an informal, decentralized manner allowing flexible communication and decision-making processes. Central to the organizational structure of the EACP are its five working groups: Coordination, Internationalisation, Supply Chain & Technology, Skills and UAS.

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 plays 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, within only a few years the EACP has gained a 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.

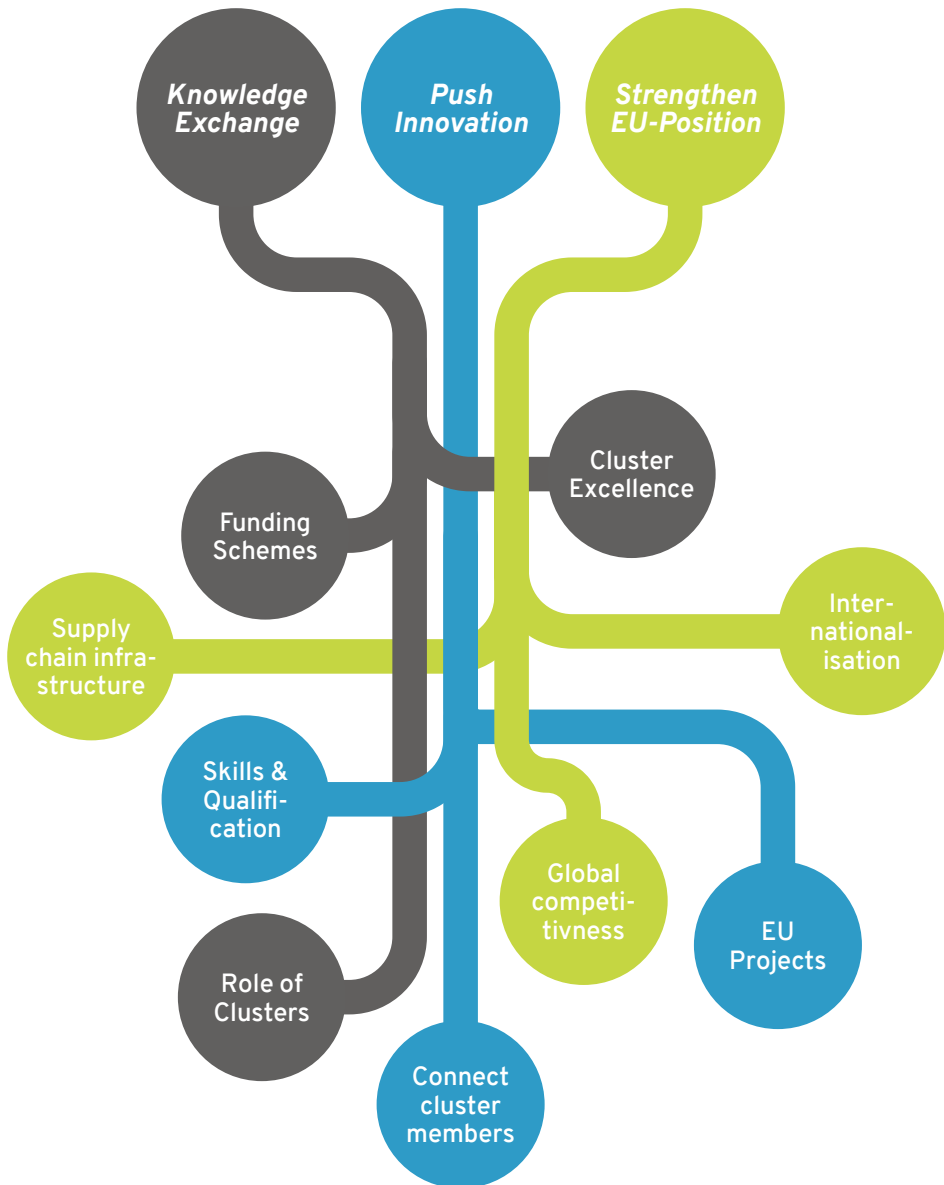
EACP collaboration only succeeds because of deeply embedded core values of trust, engagement, dependability and joint added-value generation, allowing the EACP to function as a network based on respectful plurality and mutual commitment.

As the most active aerospace collaboration platform, the 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 the 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 embodies the cooperative values and close interactions that enable its vision of strengthening the whole through the diversity of the many.

OBJECTIVES





KNOWLEDGE EXCHANGE

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 for the 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, where the EACP brings together actors from industry and research communities to develop new ideas needed to improve technologies, products and processes.





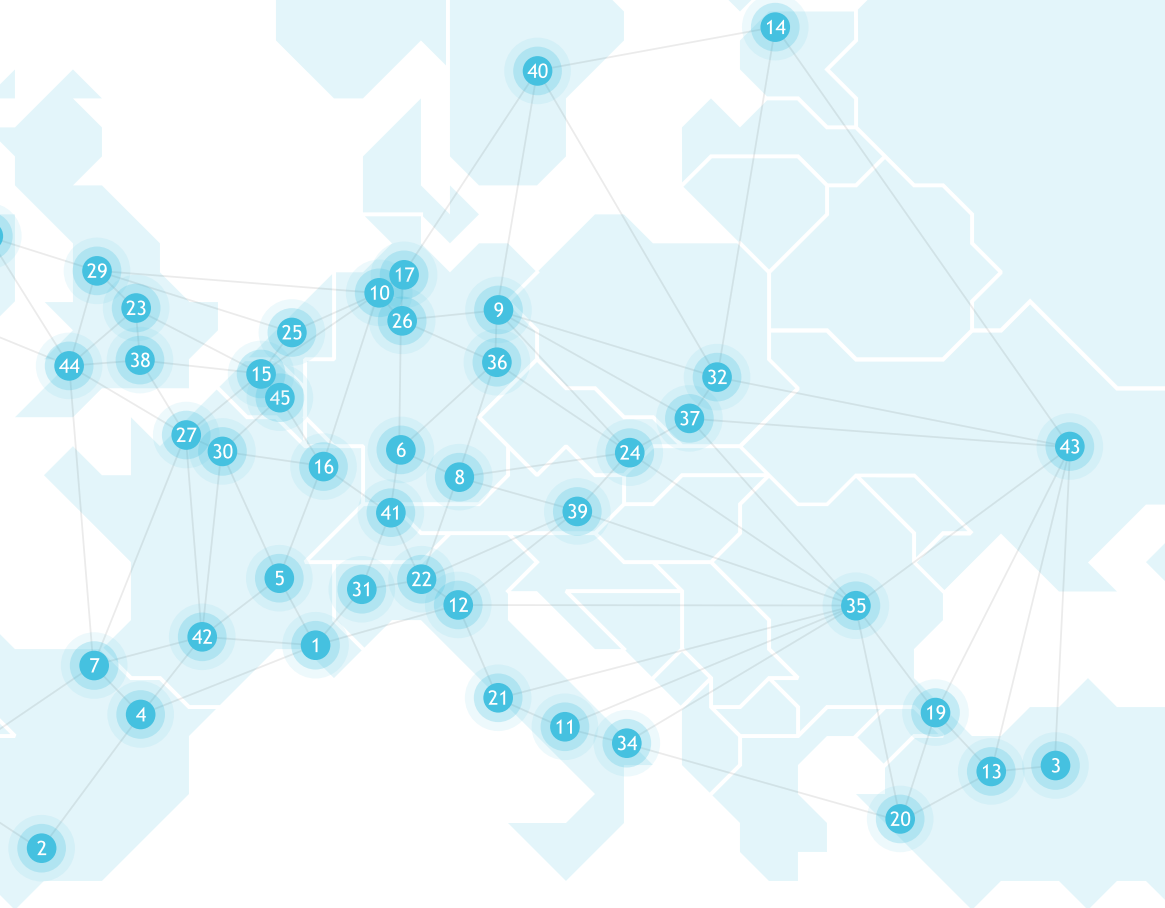
STRENGTHENING EUROPE'S POSITION

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), Clean Aviation, EASN (European Aeronautics Science Network), SESAR (Single European Sky ATM Research Programme) and EEN (Enterprise Europe Network).



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 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 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.

The 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 Working Group Internationalisation, 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.

These 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 programme continues with project presentations and in depth group discussions to foster excellence between international cluster managers. In 2023 the GAC evolved into the Global Aerospace Cluster Partnership with the aim of an even closer worldwide cluster collaboration.



WORKING GROUP SKILLS

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.



LEARN & FLY

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

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 COORDINATION

The Working Group Coordination 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 & TECHNOLOGY

The Supply Chain & Technology Working Group aims to share knowledge and best practices for improving the performance of the European Aerospace industry's shared supply chains and technology competencies.



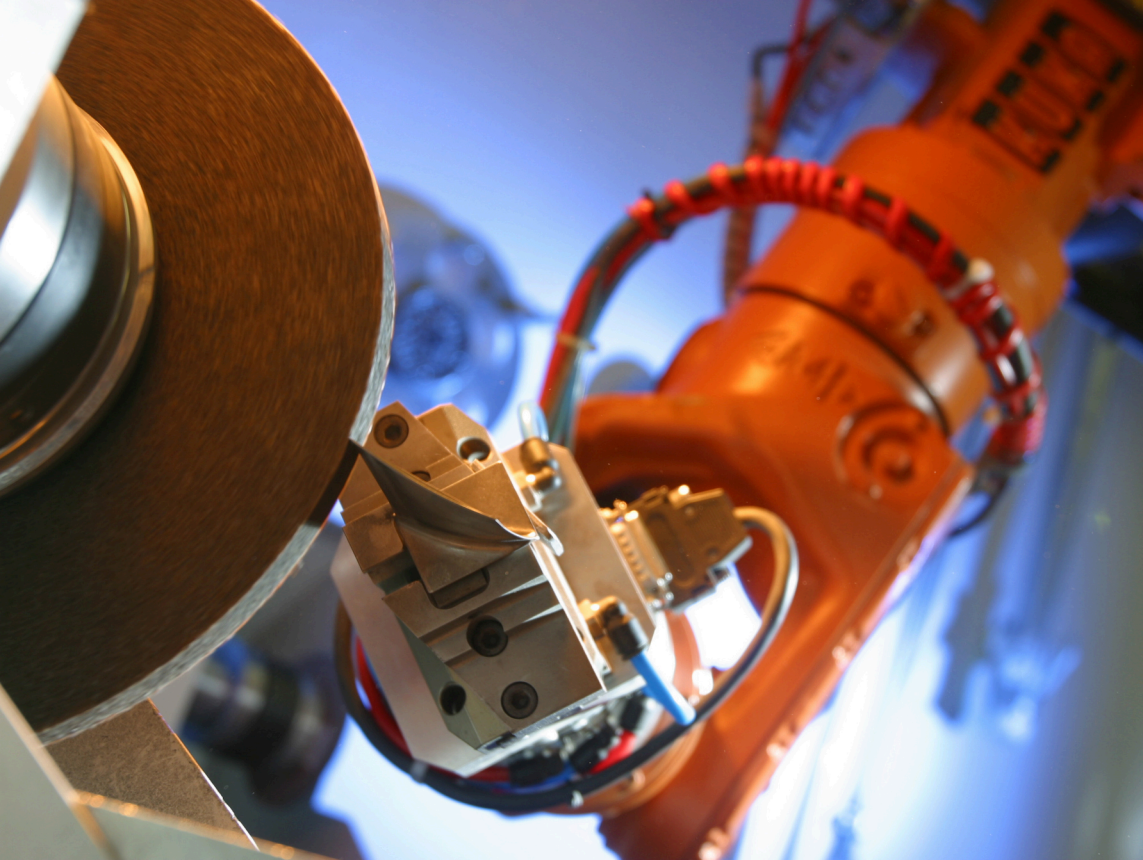
It does so by developing the capabilities of cluster managers to work together across Europe and share best practices in support of their regional companies in the areas of skills, innovation and business improvement in their supply chain and use of technologies. The group recognises that there are significant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

A number of European, national and regional business support programmes have been developed in different aerospace clusters. Besides, European research programs are monitored to identify innovation challenges and create links to regional companies. One goal is to set up specific strategic projects that meet SME needs to be proposed to EU programme calls.

Learning from each other, the Working Group has the opportunity to benchmark how these programmes are delivered most effectively and the resulting improvement in performance of the companies, and solving our industry's common challenges (pollution, fuel efficiency, production costs, etc.).

By creating a European map of technology centres of excellence and universities according to their competitiveness and competences in order to create a technologies database, and utilizing existing databases of technology competencies, SMEs can connect with technology centres and project partners.

The purpose of the group is to understand how EACP members can best improve the overall performance of Europe's aerospace supply chains and overall performance with the use of technology.



NATEP

National
Aerospace
Technology
Exploitation
Programme

NATEP was a project designed by a group of clusters for companies in the aerospace supply chain in the UK. Over 100 novel technologies were developed within the project, with the participating clusters providing expert support. The technology support program could be developed as an exemplar for the wider European aerospace supply chain.

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.



Building sectoral bridges to strive for innovation and collaboration

UAS is the newest addition to the EACP's Working Groups. Since 2020, cluster and industry representatives are teaming up to discuss sectoral developments and market opportunities in Europe. Members of this Working Group are EACP clusters that have a focus on UAS, besides manned aviation and aerospace industry in general. The exchange from different perspectives is of high value for EACP clusters and its

members, given the fact that European companies and regulators are at the forefront of the upcoming markets of UAM and drones. The Working Group UAS represents many of these European innovative companies and start-ups and is committed to raising its voice for them.

Moreover, the WG is connected with SEAR JU and holds a seat in the EU expert group on drones.

EACP for a Smart and Sustainable Unmanned Aircraft Eco-System in Europe

One example of an excellent joint effort is the WG UAS' contribution to the consultation process of the European drone strategy 2.0. Throughout all three hearings in the elaboration process of the strategy, the Working Group UAS gave consolidated feedback. The different focus topics were:

- 1.** Urban Air Mobility and U-space
- 2.** Enhancing UAS services, including the SME dimension
- 3.** Develop Civil-Defence industry synergies and technology building blocks

One of the most important roles of the EACP is to be the voice of SMEs. Hence, the feedback focused on restrictions of the market access for SMEs and administrative burden related to the operational authorisation process. The latter are especially hard to

tackle for small businesses in comparison to large entities. The Working Group UAS claimed that simplifying regulations and working with examples and use-cases would make them more understandable and increase applicability, thus supporting communication between regulators and SMEs/Start-ups.

It is a success, that the Drone Strategy 2.0 explicitly acknowledges the role of SMEs and start-ups and addresses several of the 19 defined flagship actions to them. Action no 3, for example, intends to 'adopt new European standard scenarios for low to medium risk aerial operations'. Further developing those regulatory approaches will help to address business uncertainties and support the inclusion of SMEs. Since its foundation in 2009, the EACP and the Working group UAS since 2020 spread this fact widely. It's a success that the strategy has a clear emphasis for SMEs.



FURTHER EACP PROJECTS

EUROPEAN CLEAN AVIATION REGIONAL ECOSYSTEM (ECARE)

The ECARE project is a 24-month project funded by the Clean Aviation Joint Undertaking to support the ambitious goal of climate neutrality by 2050.

The consortium behind ECARE comprises three EACP clusters – Aerospace Valley, Hamburg Aviation, and Campania Aerospace District – as well as a Belgian SME specializing in aeronautics dissemination and communication services, EASN-TIS. Together, they bring their expertise and experience to the

project, with additional involvement from European aeronautical clusters through the EACP partnership.

ECARE aims to create synergy between European, national, and regional roadmaps, funding programs, and aeronautical stakeholders. By fostering collaboration and co-creation, ECARE paves the way for a sustainable and innovative future in the European aerospace industry. Through a comprehensive digital platform and active stakeholder



engagement, ECARE aims to accelerate the development of clean aviation technologies, maximize funding impact, and drive Europe's leadership in global aerospace markets.

The power of collaboration which lies at the heart of ECARE is made up by a digital platform that provides valuable resources and facilitates information exchange. It maps funding opportunities, relevant projects, scientific and industrial resources, and acts as a forum for sharing knowledge. Playing a central role in this collaborative endeavour is the ECARE stakeholders group, consisting of funding bodies, clusters, and diverse members

from the aeronautical industry. They are the ones sharing the ECARE methodology and recommendations with the wider European aerospace community, driving forward the progress of sustainable aviation technologies and practices, thus helping to foster innovation and a cleaner future for the aviation industry.



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 worldwide 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 practices 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.

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