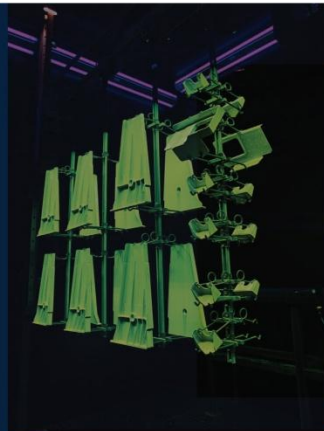
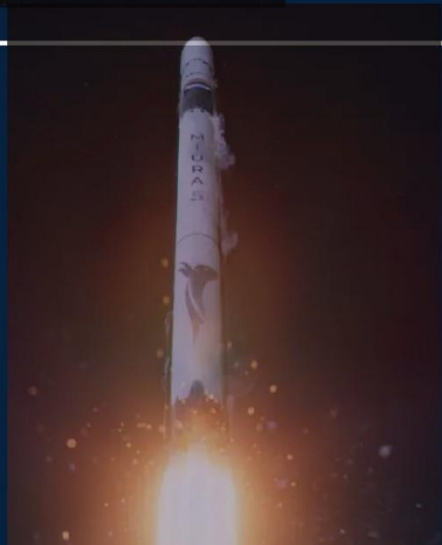
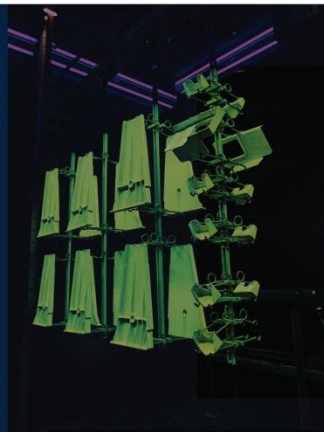




The Basque AeroSpace Cluster





The Sector



The Aerospace Value Chain...



... made up
by **79**
Members
who...

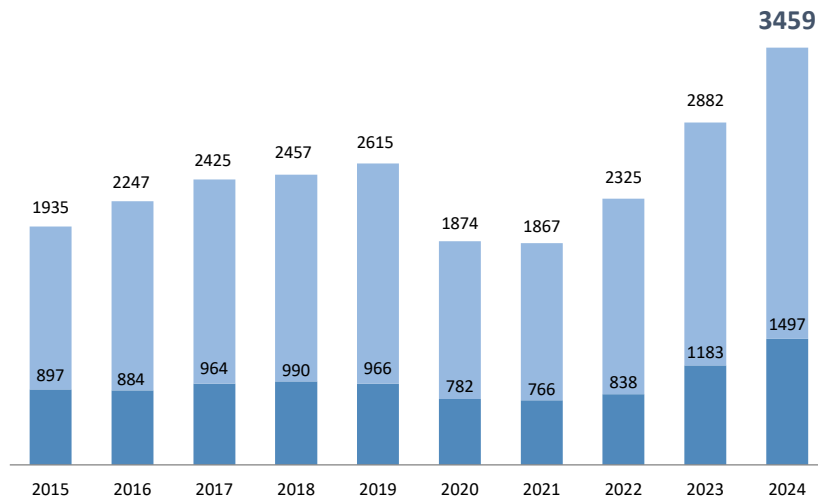


... directly generated in 2024...

Geographical breakdown	Turnover (€M)	Increase vs. 2023	Employment	Increase vs. 2023
Basque Country	1.497	26,6%	5.930	7,9%
Rest of Spain	1.061	11,1%	6.365	12,4%
Rest of the World	901	21,2%	5.218	23,2%
TOTAL	3.459	20%	17.513	13,8%

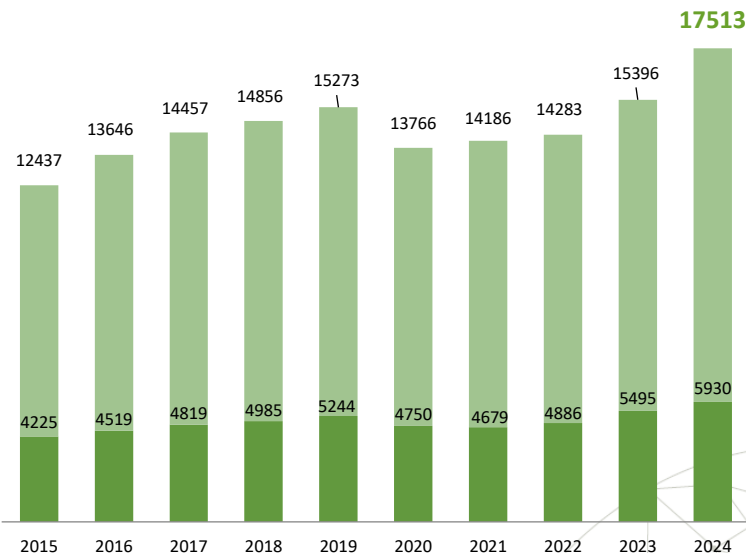
EVOLUTION TURNOVER

■ Basque Turnover ■ Total Turnover



EVOLUTION PEOPLE

■ Basque Employment ■ Total Employment



Having **doubled** Turnover and Employment in the last decade... till COVID... **recovered** again...

... at all of their worldwide facilities...

176 Facilities

102 in Euskadi

43 in the rest of Spain

31 Abroad (Brazil, China,
Germany, India, Malta, Mexico,
Morocco, Poland, Portugal,
Switzerland, UK, USA)



GLOBAL
SCOPE

... that represent...

Cluster Dimension facilities in Basque Country



HEGAN Members Dimension facilities in Spain

* EUSTAT 2024 ** TEDAE 2023 *** ASD 2023



aerospace **TURNOVER**

aerospace **EMPLOYMENT**

aerospace **R&D INVESTMENT**

The **3rd**
Aerospace
Pole in Spain



... and who are involved in:

CURRENT AND FORMER PROGRAMMES & CLIENTS

AEROSTRUCTURES

AIRBUS A300/310/318/319/320/320neo, ceo/321/330/330neo/ 350XWB/380, BELUGA XL. AIRBUS DS A330MRTT/400M, CN235, C295. AIRBUS HELICOPTERS AS332/350, EC135, NH90, TIGRE. ATR 42,72. BELL 505 JRX. BEECHCRAFT BARON/ BONANZA/ KING AIR. BOEING 737, 747-LCF, 747-81/F, 777, 787, E-3 AWACS. BOMBARDIER Q-Series, CRJ Family, CSeries. CASA C101/212. DAHER-SOCATA TBM700. DASSAULT FALCON 5/7X. DORNIER D0728. EMBRAER ERJ135/ 140/ 145/ 145LR/ 145XR, LEGACY, 170/ 175/ 190/ 195, E175/190/195-E2, LINEAGE, KC-390, PHENOM. EUROFIGHTER TYPHOON. LILIUM. SIKORSKY H-92, S-92. SINO SWERINGEN SJ30.

ENGINES

CFM INTERNACIONAL CFM56, LEAP. EPI TP400. EUROJET EJ200. GENERAL ELECTRIC CF700, CT7, F404/ 414, GE90-14/ 115, J79, LM2500, T700. HONEYWELL AS907, HTF7000, Lycoming T53/55, Garret TPE331/TFE731, TF50. MTRI MTR390E. PRATT & WHITNEY F135, JT8-STD/ 200, PT6/ T3, PW535/ 150/ 810/ 1000G. POWERJET SaM146. ROLLS-ROYCE BR710/ 715, RB211, TRENT MT30/ 50, TRENT 500/ 700/ 7000/ 800/ 900/ 1000/ XWB/ULTRA-FAN. ROLLS-ROYCE NORTH AMERICA A250, A601K, M250, T63. SAFRAN AIRCRAFT ENGINES ATAR, 9KPLUS/ 09C/ 09K50, CFM 56, SaM146, Silvercrest. SAFRAN HELICOPTER ENGINES ARRIEL, MAKILA, ARRIUS.



SYSTEMS & EQUIPMENT

AIRBUS, AIRBUS DS, ALENIA, BAE Systems, BOMBARDIER, CESA, DIEHL-BGT, EUROFIGHTER, GOODRICH, HONEYWELL, IAI, INDRA, LATECOERE, LIEBHERR, MARTIN-BAKER, MBDA, RATIER FIGEAC, ROLLS-ROYCE, SAFRAN AEROSYSTEMS, SAFRAN LANDING SYSTEMS, SAFRAN NACELLES, SAFRAN TRANSMISSION SYSTEMS, SAGEM, SIKORSKY, THALES.

SPACE

ESA/NASA ARTEMIS, ATHENA, AURORA, CLUSTER, CX-OLEV, EGNOS, ENVISAT, EUCLID, EUREKA, EXOMARS, GAIA, GTAB, HERMES, HERCHEL-PANCK, HUBBLE SPACE TELESCOPE, HIPPARCOS, INTEGRAL, ISEE-B/aurori/CRV, MELISSA, METEOSAT, METOP, MSG, MTG, NSL, PROBA-3, ROSETTA, SENTINEL, SOHO, SOLAR ORBITER, SPACELAB, ULISSES, XMM-NEWTON. OTHERS AMC21, AMOS3, ARABSAT 4A/B, ARIANESPACE, ASTRA1M, ASTRIUM, CIEL-2, CHINASAT9, EXPRESS AM33/44, GE 1i/2i, GALAXY 17, GALILEO, HELIOS I/II, HISPASAT 1C/ D, KOREASAT5, MINISAT, NETLANDER, OLYMPUS, PLEIADES, SPACE X, SPOT-4, SYRACUSE 3B, SUPERBIRD7, SPAINSAT, TURKSAT 3A, WSL, YAMAL 200.

Key Partners for the most
important international
Clients / Programs

Members Main Capabilities:

- Design and Manufacturing of big equipped **Aerostructures**
(Sections, Wings...)
- Design and Manufacturing of complete **Engine** subsystems
(LPTs, TBHs...)
- Design and Manufacturing of complete subsystems for **Space**
(Electromechanical, Cameras, Antennas, Communications...)

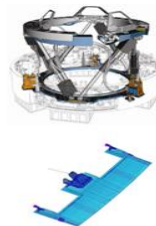


3 Tiers1:
AERNNOVA /
ITP AERO /
SENER

Other Capabilities / strengths:



- Conceptual Design
- Detail Engineering
- Integration and Assemblies
- Production Solutions
- Smart Industry
- Components
- Tooling
- Machining and Casting
- Treatments and Sheet Metal
- Composites
- Additive Manufacturing
- Testing and Certification
- MRO
- ...
- EN9100
- NADCAP
- DOA/POA
- ...



Intensive in **Quality** and **R&D** / Multiclient –
Multiproduct / Complete Product Cycle

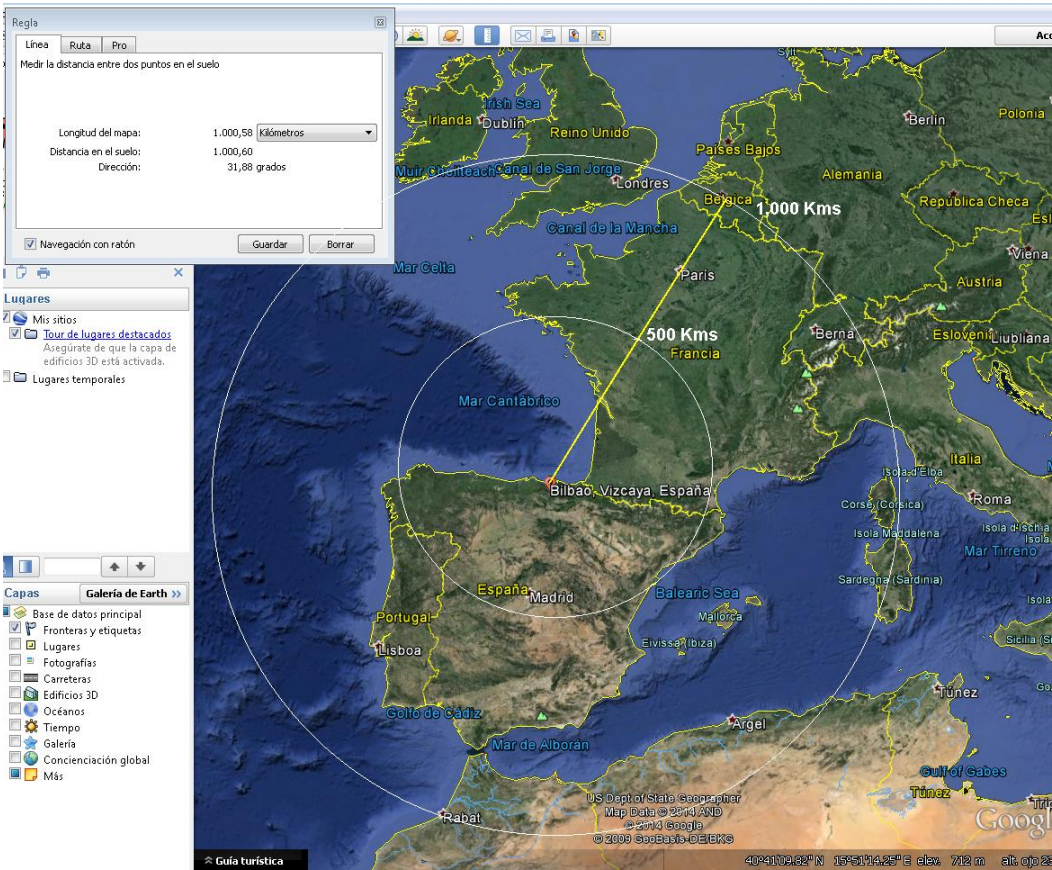
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Members are EN9100 certified since 2005
100% of special processes are NADCAP certified since 2007

A strategic site in Europe...



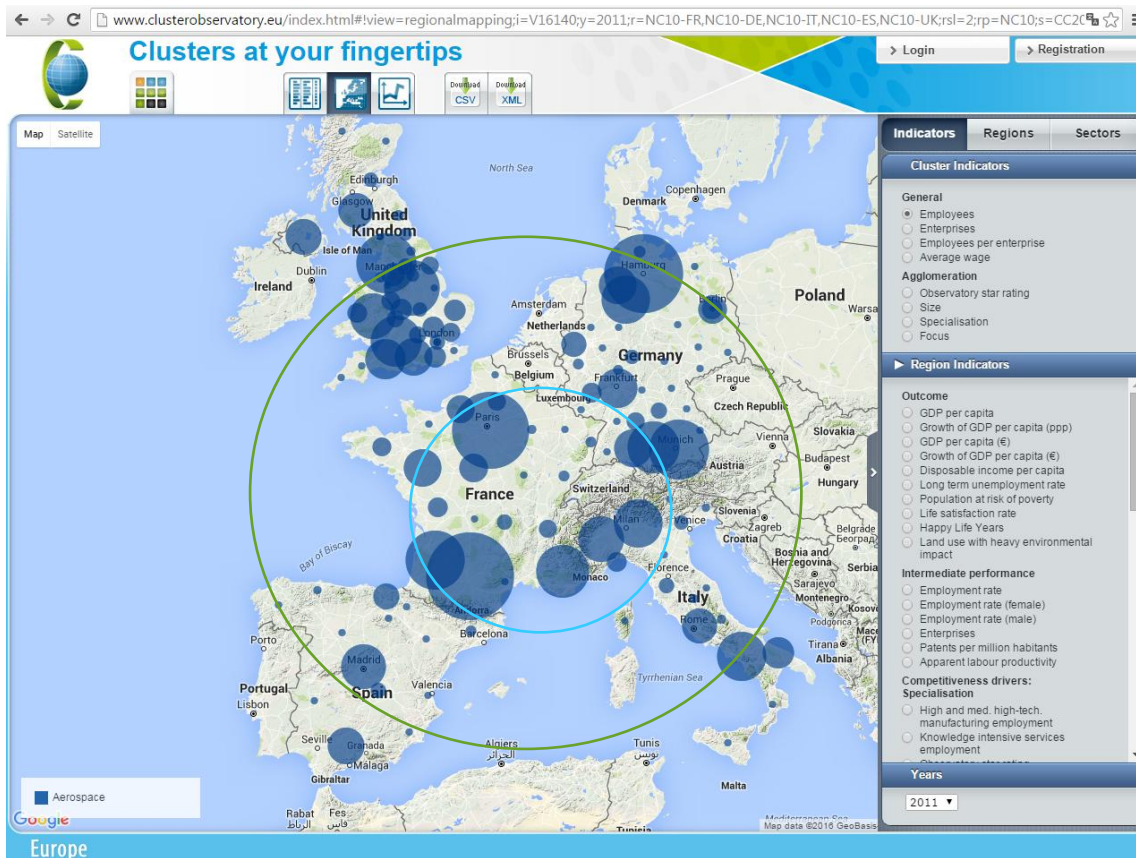
- Atlantic Europe
- Atlantic Arc
 - Atlantic Europe
 - Rest of Europe



The Basque Country:
**Best Medium-Sized
European Region in
Connectivity** (Financial
Times 2016)

Financial Times
awarded the **Basque
Country as an
attractive region for
foreign investment**
(2019)

... and strategic for the Sector



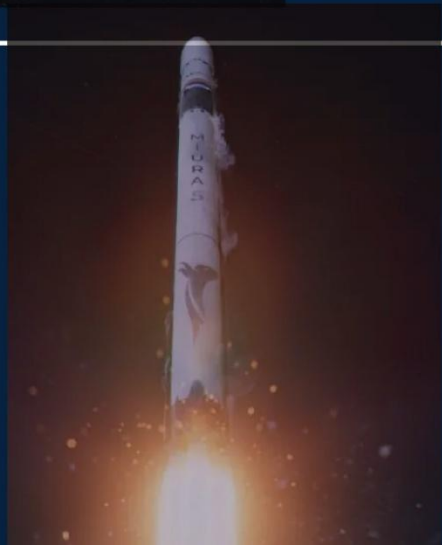
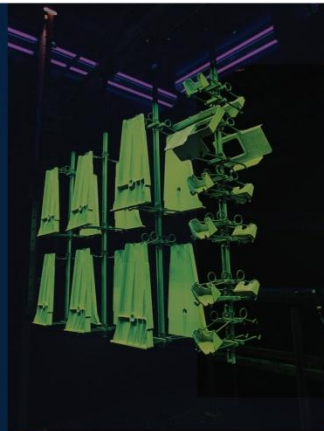
500 Kms radius:

- Nouvelle-Aquitaine & Occitanie
- Madrid Region & Northern Spain

1,000 Kms radius:

- Spain
- France
- Portugal
- Belgium
- Switzerland
- Southern UK
- Northern Morocco
- Northern Italy

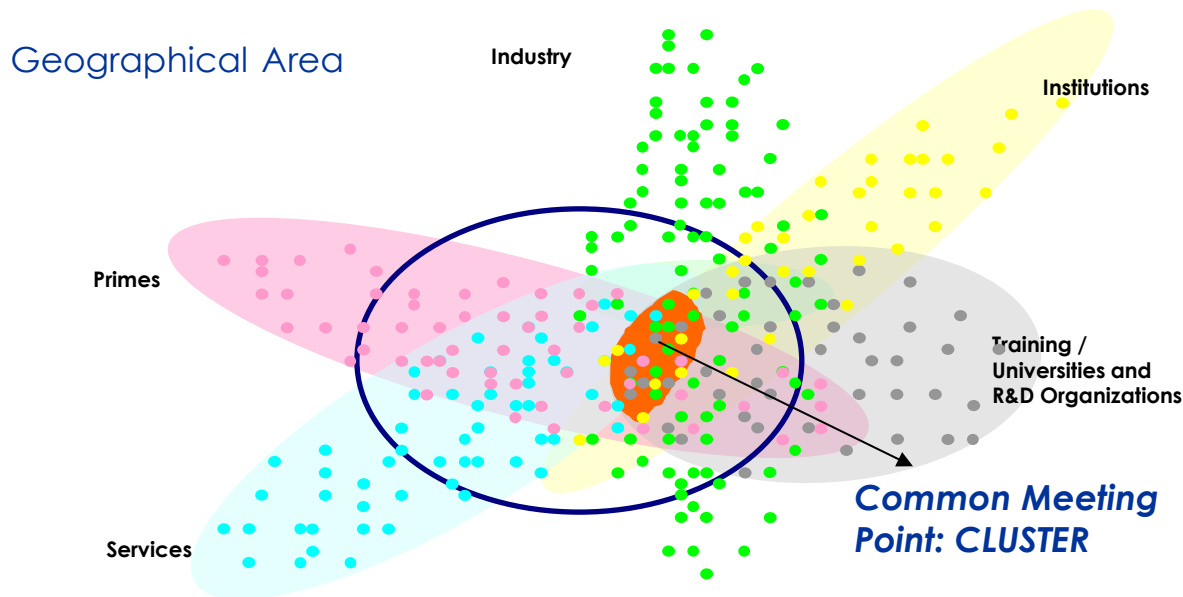
Linked with the main Aerospace Poles in the Atlantic & Mediterranean area



The Cluster



"Cluster is a group of interconnected companies and associated institutions, linked by activities, products, markets and common interests and complementary geographically close". **M. Porter.**



HEGAN was
the first
Regional
Aerospace
Cluster
founded in
Spain in 1997



The Basque System of Clusters is studied at **HARVARD BUSINESS SCHOOL**



Brief History

1966 - **SENER** started working in the space sector: ESA projects

1983-1985 - **SENER** started working in the aeronautical sector: FACA, EJ200

1988-1992 - ITP (today **ITP AERO**) and GAMESA Aeronáutica (today **AERNNOVA**) and some aeronautical SMEs are founded

1992 - The Basque Government (EJ/GV) commissioned MONITOR (Michael PORTER) and **SENER** a study about the competitiveness of the Aeronautics and Space Industry of the Basque Country

1993 - The Technology Committee of the Aeronautics Cluster is created by **AERNNOVA**, **ITP AERO**, **SENER**, Technology Centres, the **UPV/EHU** (Basque Country University), and the Industry Department of the Basque Government

1997 - The Aeronautics and Space Cluster of the Basque Country–HEGAN and the **CTA** (AeroSpace Technologies Centre) are created with **AERNNOVA**, **ITP AERO** and **SENER** as Founders

1998 - **14 members** were part of the cluster

...

2025 - 55 Business Groups and SMEs, 10 R&D Entities, 5 Universities and 9 Allies have become members of the association: **79 Members**

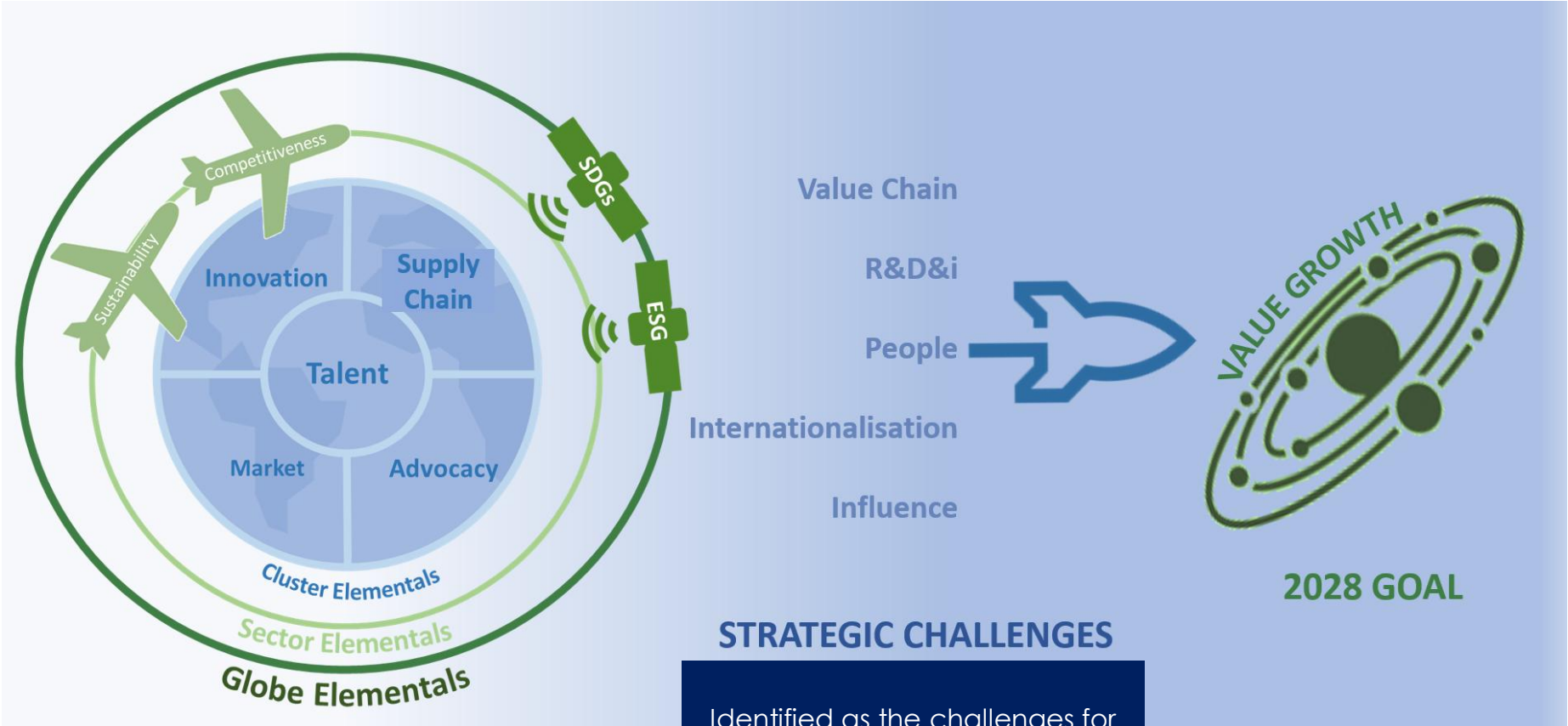
Young but
Consolidated

Purpose

HEGAN is a Cluster Association whose purpose is to **generate Collaboration and Influence** by implementing collaborative actions that answer to the strategic challenges of its Members, helping them **grow sustainably and creating value** for the Aerospace Cluster and the Society.

common **strategies** DRIVER
conjoint **roadmaps** FACILITATOR
cooperative **projects** DINAMIZATOR
international projection GENERATOR
key **information** SOURCE





STRATEGIC CHALLENGES

Identified as the challenges for which **HEGAN** add value to its Members

Know more...

The Cluster in a glance:



Last Annual Report:



Aerotrends Conferences:



AeroSpaceLand
WELCOME!

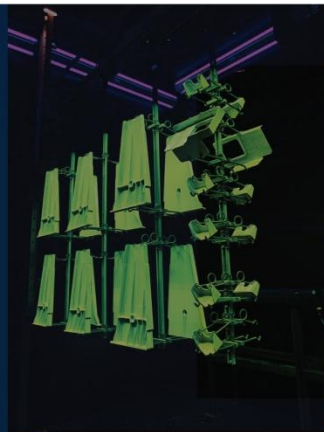
Co-financed by:

EUSKO JAURLARITZA GOBIERNO VASCO



DEPARTAMENTO DE INDUSTRIA
TRANSICIÓN ENERGÉTICA Y
SOSTENIBILIDAD





eskerrik asko !
¡ muchas gracias !
thanks a lot !

