

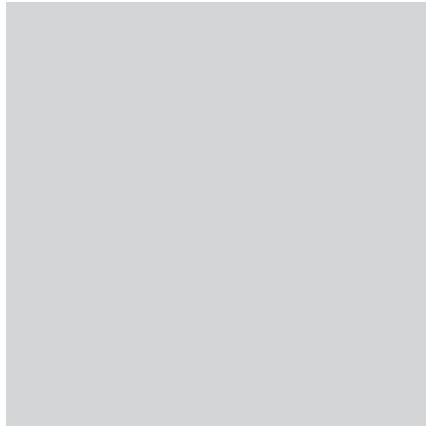
Agoria-FLAG

STRATEGY



.AGORIA

FLAG
FLEMISH AEROSPACE GROUP

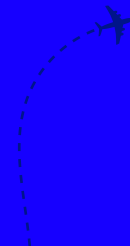




“ After the inauguration of FLAG in Agoria Flanders, the MANAGEMENT committee decided to set up four focus groups (strategy, technology, business development and advocacy) to update and implement the strategy of Agoria-FLAG as CHARTED in 2014 based on the Altran study.

I would like to thank the members of the management committee and of the focus groups who have taken on these tasks, thus ensuring that Agoria-FLAG, in close cooperation with our governments, is developed further into a respected, internationally oriented cluster of companies and knowledge institutions. ”

Trudo Motmans
Chairman

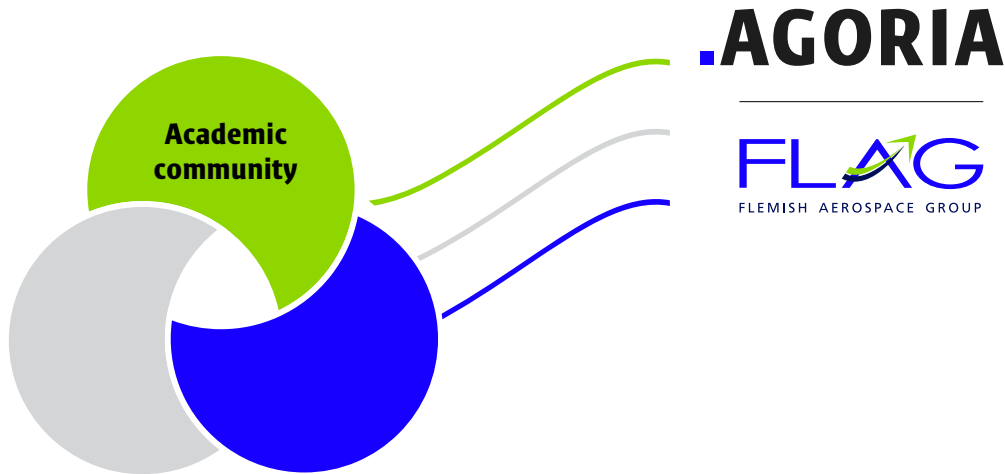




→ **The Flemish Aerospace Group** - FLAG - **originated in the 1980s** from the Industrial Movement of the then VEV (Vlaams Economisch Verbond) [Flemish Economic Association], brings together most Flemish companies active in the **aviation industry** and, as a non-profit association, has made **fundamental contributions** to the development of the Flemish aviation sector over the past decades.

The **accession of Flemish universities and research centres** since 2015 has an undeniably enriching effect on the Association.

From 2017 to 2020, FLAG followed the IBN (Innovative Business Network) trajectory supported by the Vlaams Agentschap voor Innovatie en Ontwikkeling -- VLAIO [Flemish Agency for Innovation and Development]. This has led to a business group that actively uses the **triple-helix** effect between the government, academics and the business world



Since January 2020, **FLAG has been integrated** as a relatively autonomous business group - cluster - in **Agoria-Flanders**. Optimal use of possible synergies should benefit the further development of the network and the operation of .Agoria-FLAG.

→ Agoria-FLAG represents a sector with a very **significant economic, technological, social “footprint”** in the Flemish landscape. With about 65 active companies, and all the Flemish colleges and universities, the Flemish aviation sector accounts for over 3300 direct jobs and an estimated turnover of €1,2 billion. Its strength lies mainly in excellence, technological creativity and successful Research and Development (R&D).

→ The Flemish aeronautical industry has an interest in joining the **broader international frame of reference**, which is determined by clear EU ambitions: strategic autonomy (both technological and in the field of security and defence) and a **climate-neutral** Europe by 2050, for which the objectives are set out in the “Green Deal”. For a successful ecological transition, the aviation sector will have to focus on **sustainable transport** with minimal emissions or even CO₂ neutral aviation. To this end, the development of **innovative techniques** in the various fields of the aircraft industry (structures, propulsion, systems and ground systems) is becoming quite urgent. This is both a **challenge** and a unique **opportunity** for the Flemish aviation industry.



direct
jobs

3300



turnover

1,2 Mld €

climate-
neutral
Europe by
2050

Green Deal



- The **protracted COVID-19 crisis** has dramatic economic consequences. Commercial aviation and the industry involved are particularly hard hit. Due to a lack of financial resources, companies risk having to reduce their R & D activities drastically at a time when investment in innovation is crucial for anchoring the “competitive edge” in Flanders. **Support from the authorities** at the different levels is **indispensable** in this difficult period.
- The advance of new technologies and digitization, the transformation of a circular and low-carbon economy and the impact of the current Corona crisis will undeniably have an impact on the **required competency profiles** of our (highly) educated technical potential of tomorrow.



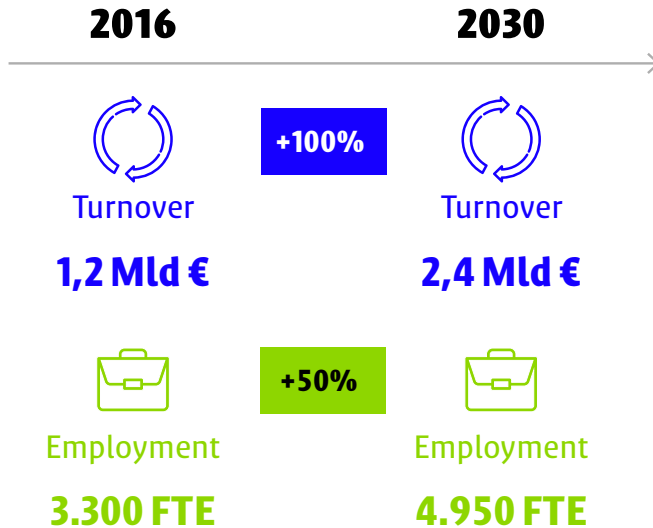


STRATEGIC

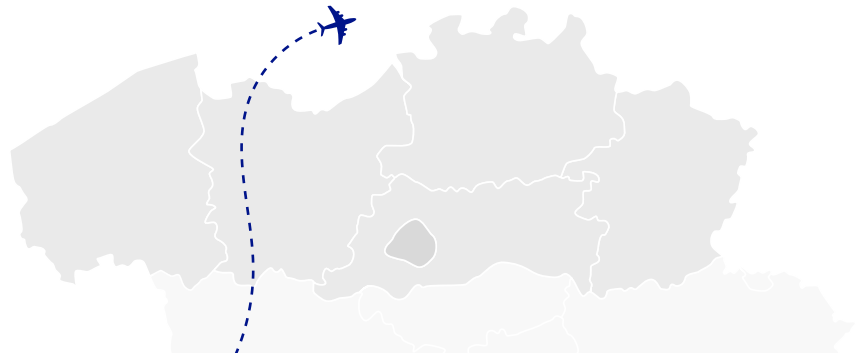
The raison d'être of Agoria-FLAG is to **stimulate the growth of the Flemish aviation industry** in general, and to **promote the interests of its members** at the regional (Flemish), federal and European level. These interests will inevitably be framed in the international long-term trends concerning ecology, economy and technology. Specifically, we refer to the Green Deal, the economic recovery initiatives, innovative concepts such as Urban Air Mobility (UAM) and technologies based on low carbon emissions, hydrogen and electrification.

The strategic objectives of Agoria-FLAG are ambitious:

- The aim is to double the **turnover** of the Flemish aviation industry by 2030 and to increase **employment** by 50%;



- Agoria-FLAG wants to defend the interests of its members optimally through **targeted lobbying activities at both Belgian levels of government** (Flemish and federal). In the coming period, this lobbying will focus on **two** - closely intertwined - objectives:
- give the aviation sector, and in particular the Agoria-FLAG members, **access to the recovery measures in the Covid-19 crisis**, which are being put in place at the different levels (Flemish, federal and European);
 - obtain **optimal support** from Flemish companies for **research and development activities**, which are necessary so as not to miss the momentum of knowledge development and technological innovation. Special attention will be paid to the European programmes;
- **Building further on the VLAIO recognition as an IBN (Innovative Business Network)**, Agoria-FLAG wants to bring cooperation among its members to cluster level and extend it **to other sectors** in Flanders, but also to give it an **international dimension**.

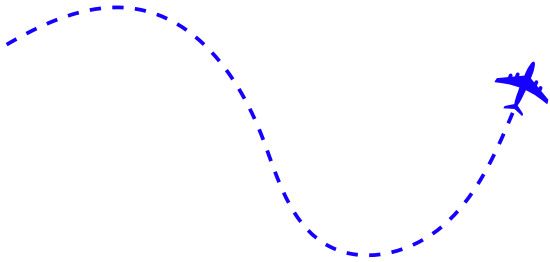


→ Agoria-FLAG wants to capitalize optimally on the advantages of integration within Agoria.

The main ones are:



- Agoria-FLAG wants to be actively involved in preparing the **labour market** of the future. It therefore wants to contribute to the **identification of the required future competence profiles, awareness and support** of companies in this challenge through research and through its participation in the Agoria “Be-the-Change” project.
- **Increasing the number of members** is not an objective in itself for Agoria-FLAG. By achieving its strategic objectives effectively for the benefit of its members, Agoria-FLAG aims for **sustainable membership** first and foremost. Of course good functioning is implicitly expected to attract new members.





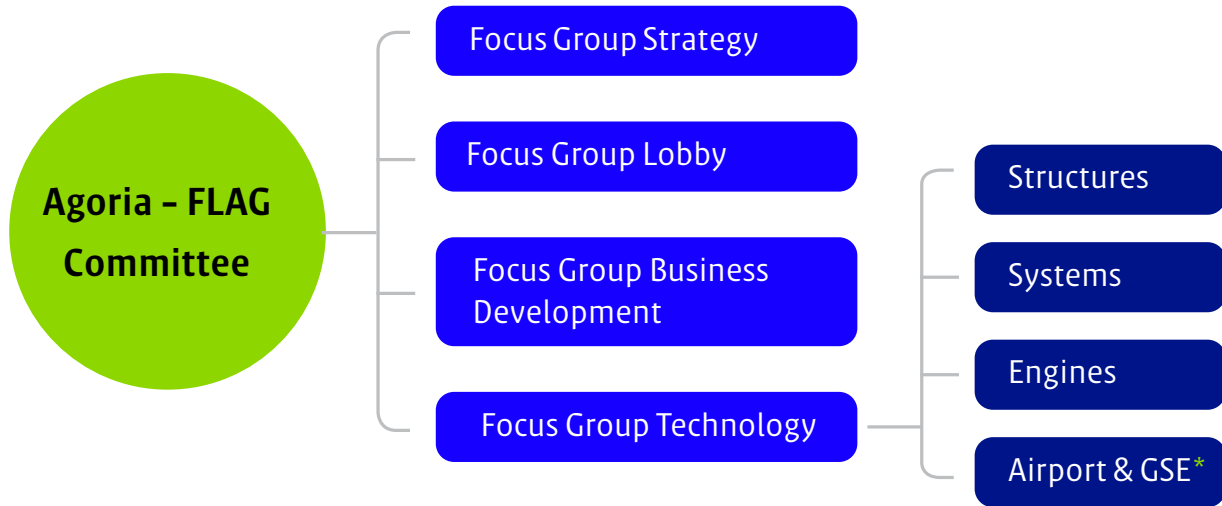


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Agoria-FLAG will pursue its strategic objectives through a targeted operation of its various “**Focus Groups**” (FG) in the domains of Technological Development, Business Development and Lobbying. Achievement will be monitored on the basis of defined KPIs.



Organisation and focus



* GSE: Ground Support Equipment

The **Focus Group on Technology** aims to inform and involve the Agoria-FLAG members actively in research and innovation for new technologies (in terms of materials, processes, systems and infrastructure) that should enable Flemish companies to continue to offer competitive products to international Original Equipment Manufacturer (OEMs) in future programmes. This is the so-called “**Technology Watch**” in which the development of technology is closely monitored from its early stages.

With this in mind, it will:

- Ensure a Agoria-FLAG representation in the main international aviation associations (**EACP, ASD, EqIMG, ...**). These interactions should enable it to stimulate the exchange of technology knowledge and contribute to an effective “push/pull” of innovation;

EACP: European Aerospace Cluster Partnership

ASD: Aerospace, Security and Defense

EqIMG: Equipment Industry Management Group

- Rely on an inventory of “Project calls” on a Flemish, federal and European level, to identify opportunities for participation and facilitate possible collaborations (project-based or not) among the Agoria-FLAG members on the one hand and international cooperation on the other;
- Develop a dynamic “Technology Roadmap” that takes stock of the technological trends for the known long-term ambitions (e.g. EU Green Deal). This “Roadmap” will cover the different segments in our sector (aerostructures, propulsion, avionics systems, airport and ground systems). It will not only allow to communicate the R&D support needs to the Flemish and federal Government, but will also help member companies to develop their own R&D roadmap.

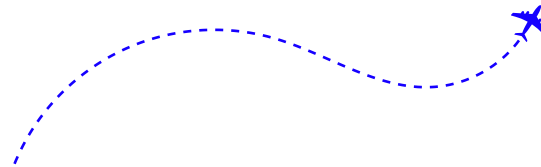




FG BUSINESS DEVELOPMENT

FG Business Development wants to inform Agoria-FLAG members, but also non-connected entities, about the aeronautical programmes and their (future) technological needs. Flanders has a number of high-tech companies that have at their disposal potential technologies and solutions that are vital in a competitive aviation sector. Through targeted actions Agoria-FLAG wants to stimulate these companies to get involved in the aviation programs of the future. This is known as **“Industry Watch”** in which technological developments are followed up at a later stage for targeted applications on future aviation platforms.

In addition, Agoria-FLAG also wants to use the relationships and frameworks with international OEMs for important military purchases of airborne equipment to create additional “business opportunities”.



It wants to achieve its objectives by **stimulating partnerships between its members, other Belgian associations (BAG, Skywin, ...) and the international community**, as well as by creating added value for its members through the provision of useful tools:

- Targeted **networking** through various channels: scholarships, international associations (EACP), the academic world, etc.
- Effective **information** for companies about the classic structure, propulsion, system integration and ground segment programmes, but also with attention to “new” segments such as General Aviation and Urban Air Mobility;
- Targeted advice and coaching to companies less familiar with the specificity of aviation programmes, on: Structure, financing and subsidy opportunities, supply chain tools, etc.



The main objective of **the Focus Group on Lobbying** is to safeguard the research and development activities in the Flemish sector, by obtaining maximum support for the different levels, both for the Covid-19 recovery plans and with a view to the European ambitions of climate neutrality in the long term (2050).

It also aims to ensure that the Flemish government takes the Belgian industrial defence strategy - the basis for important defence programmes - on board when defining its R & D policy.

In order to achieve these objectives, it will build on a recent recommendation paper endorsed by the main Belgian business groups and contact the competent authorities:

- Focus on the recognition of companies in the aeronautical sector as companies in difficulty;
- Advocate an extension of the financial commitments of the federal Government in programmes of the main European OEMs (along the lines of, but not limited to, Airbus);
- Demand a relaxation of the procedures for the reimbursement of State aid;
- Seek maximum use of the EU Green Recovery Fund and alignment with the EU 2050 climate neutrality programmes;

- Advocate that the Flemish government (VLAIO) adapt its instruments (based on repayable advances) to support R&D activities with higher TRL levels and potential for commercialisation;
- Encourage more impact in the definition of research questions concerning civil aviation and defence for European projects by organizing a structural cooperation of the Flemish and federal authorities with the companies and the research institutions;
- Promote international partnerships between companies and research institutions of several EU member states in order to link up with the strategic European partnerships related to clean aviation, PESCO (Permanent Structured Cooperation), IPCEI (Important Project of Common European Interest) and the EDF (European Defence Fund).
- Steer the adaptation of the instruments of the Flemish and Federal Governments for optimal national support for national investment projects for Defence and European military development programmes of European military development programs based on their specificity (support must cover 100% of the development costs);
- Urge the Federal Government to take a decision to join a European fighter programme (SCAF - Tempest) so that the industry can take an active part in R&D activities.

It will, in particular through the participation in an **“Aviation and Defence Task Force”** at the level of the Flemish Government (Cabinet of Minister Crevits):

→ Ask the Flemish Government to initiate a study on the technological needs and opportunities for the Flemish aviation and defence industry for the next 20 years;

Agoria-FLAG will try to take advantage of the lobbying activities of **international associations** (EACP, ASD, ...) through a targeted representation in these forums.

Finally, Agoria-FLAG will play on the strengths of FIT (Flanders Investment & Trade) for the promotion of Flemish products and services for **export**.

Moreover, Agoria-FLAG will support FIT in its mission to convince foreign aviation companies to invest and establish themselves in Flanders.

The regulations and practice for issuing export licenses will be critically assessed for defence-related products.

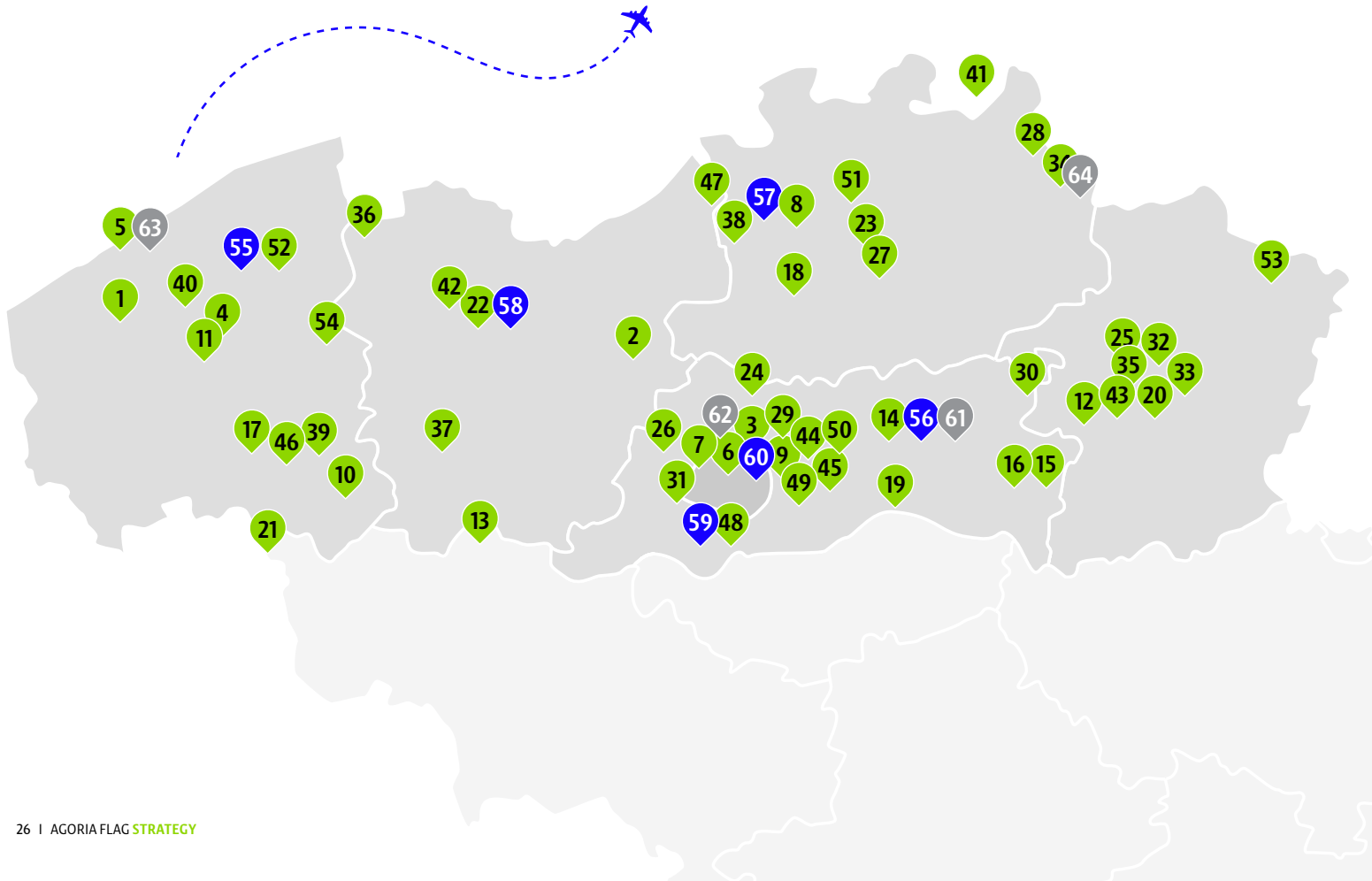






SKILLS DEVELOPMENT

- Agoria-FLAG wants to help anticipate the **dynamics of the labour market** and to connect the **training and education offer** to it. To that end, Agoria-FLAG delegates a solid representation to the workgroup on Skills within the EACP. The aim of the Agoria-FLAG participation is to detect quickly the changes that are taking place or are about to take place on the international labour market in the aviation industry.
- In addition, and building on the ESF (European Social Fund) call from 2018 - 2019, Agoria-FLAG wants to focus further on research into **strategic competence prognoses**, but also to help make our labour market **more sustainable**. To this end, we are working together with the Agoria “Be-the-Change” project.
- On the basis of the foregoing efforts, Agoria-FLAG will contribute to the awareness and support of our governments and our member companies for training needs and opportunities.



COMPANIES

1	4s&m bvba	Gistel	www.linkedin.com/company/4s-m-bv/about/
2	ACB (Advanced Circuit Boards)	Dendermonde	www.acb.be
3	ADB Safegate	Zaventem	www.adb-air.com
4	Advionics	Oostkamp	www.advionics.be
5	Aerocircular	Oostende	http://aerocircular.green/
6	Akka Belgium	Brussel	https://www.akka-technologies.com/
7	Altran Belgium	Brussel	www.altran.com
8	Antwerp Lion Oil Works (Lionoil)	Antwerpen	www.lionoil.be
9	Asco Industries	Zaventem	www.asco.be
10	Bekaert	Zwevegem	www.bekaert.com
11	BMT Aerospace International	Oostkamp	www.bmtaerospace.com
12	Cevema Surface Treatments	Lummen	www.cevema.be
13	C-Mac Electromag	Ronse	www.cmac.com

15	Curtiss Wright Surface Technologies	Sint-Truiden	www.cwst.com
16	Curtiss Wright Surface Technologies	Sint-Truiden	www.cwst.com
17	Deforche Engineering	Moorslede	www.deforche-engineering.be
18	Dejond	Wilrijk	www.dejond.com
19	Diabatix	Heverlee	www.diabatix.com
20	Droneport	Hasselt	www.droneport.eu
21	ECA Robotics Belgium	Mouscron	www.ecagroup.com
22	E.S. Tooling	Genk	www.estooling.eu
23	Elcos	Massenhoven (Zandhoven)	www.elcos.be
24	Fanuc	Mechelen	www.fanuc.be
25	Fixar	Beringen	www.fixar.eu
26	HSH Aerospace Finishes	Zellik	www.hsh.be
27	i.revitalise	Wommelgem	www.irevitalise.eu
28	Iemants	Arendonk	www.iemants.com
29	Ignition!	Zaventem	www.sabena-aerospace.com
30	L&D Jet Techniek	Diest	www.lendwaterjet.be
31	Laborelec	Linkebeek	www.laborelec.com

32	Maex Precision-Production – UPMTec	Zonhoven	www.upmtec.com
33	Melotte	Zonhoven	www.melotte.be
34	Mevi Belgium	Overpelt	www.mevi.com
35	Netalux	Paal	www.netalux.com
36	Ocas	Zelzate	www.ocas.be
37	OIP	Oudenaarde	www.oip.be
38	QinetiQ Space	Kruikebe	www.QinetiQ.be
39	Quadco Engineering	Harelbeke	www.quadco.engineering
40	Raytech	Sint-Andries (Brugge)	www.raytech.be
41	Rebel Technical Solutions	Ravels	www.rebeltech.be
42	Rogers	Evergem	www.rogerscorp.com
43	Sabca Limburg	Lummen	www.sabca.be
44	Sabena Aerospace	Zaventem	www.sabena-aerospace.com
45	Safran-Snecma Services Brussels	Zaventem	www.snecma-services-brussels.eu
46	ScioTeq	Kortrijk	www.scioteq.com

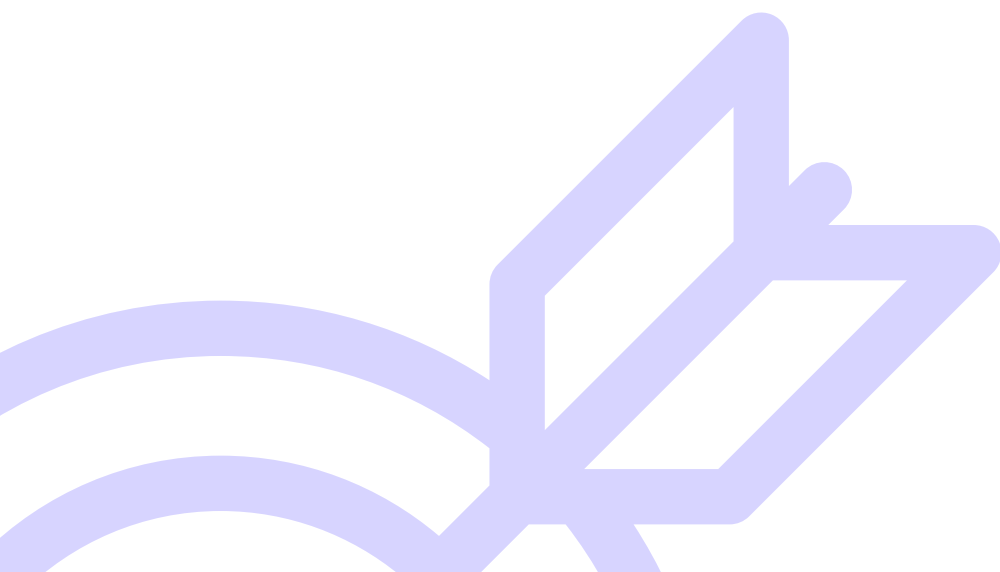
48	Siemens	Huizingen	www.plm.automation.siemens.com/global/en/industries/aerospace-defense/
49	Space Applications	Sint-Stevens-Woluwe	www.spaceapplications.com
50	TCR International	Steenokkerzeel	www.tcr-group.com
51	Unifly	Deurne	www.unifly.aero
52	(UN)Manned	Bruges	www.unmanned.aero
53	Veldeman (European Future Structures)	Bree	www.veldemangroup.com

TRAINING CENTRES

55	Hogeschool Vives	Brugge	www.vives.be
56	KU Leuven	Leuven	www.mech.kuleuven.be
57	Universiteit Antwerpen	Antwerpen	www.uantwerpen.be
58	Universiteit Gent	Gent	www.ugent.be
59	Von Karman Institute for Fluid Dynamics	Sint-Genesius-Rode	www.vki.ac.be

CENTRES OF EXPERTISE

61	Sirris	Leuven	www.sirris.be
62	Solvay	Brussel	www.solvay.com
63	VLOC	Oostende	www.vloc.eu



Agoria FLAG partners

De visuals zijn voor een groot deel in het Engels.

FLANDERS
INVESTMENT
& TRADE



Flanders
State of the Art

Agoria FLAG is a business group of Agoria. This organisation allies and paves the way for all technology-inspired companies in Belgium pursuing progress through the development or application of innovations and which, together, represent some 310,000 employees. It has over 2,000 member companies.

.AGORIA Vlaanderen

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