



VALUE CHAIN AND
REGIONAL RESILIENCE
IN EU AEROSPACE
INDUSTRIES

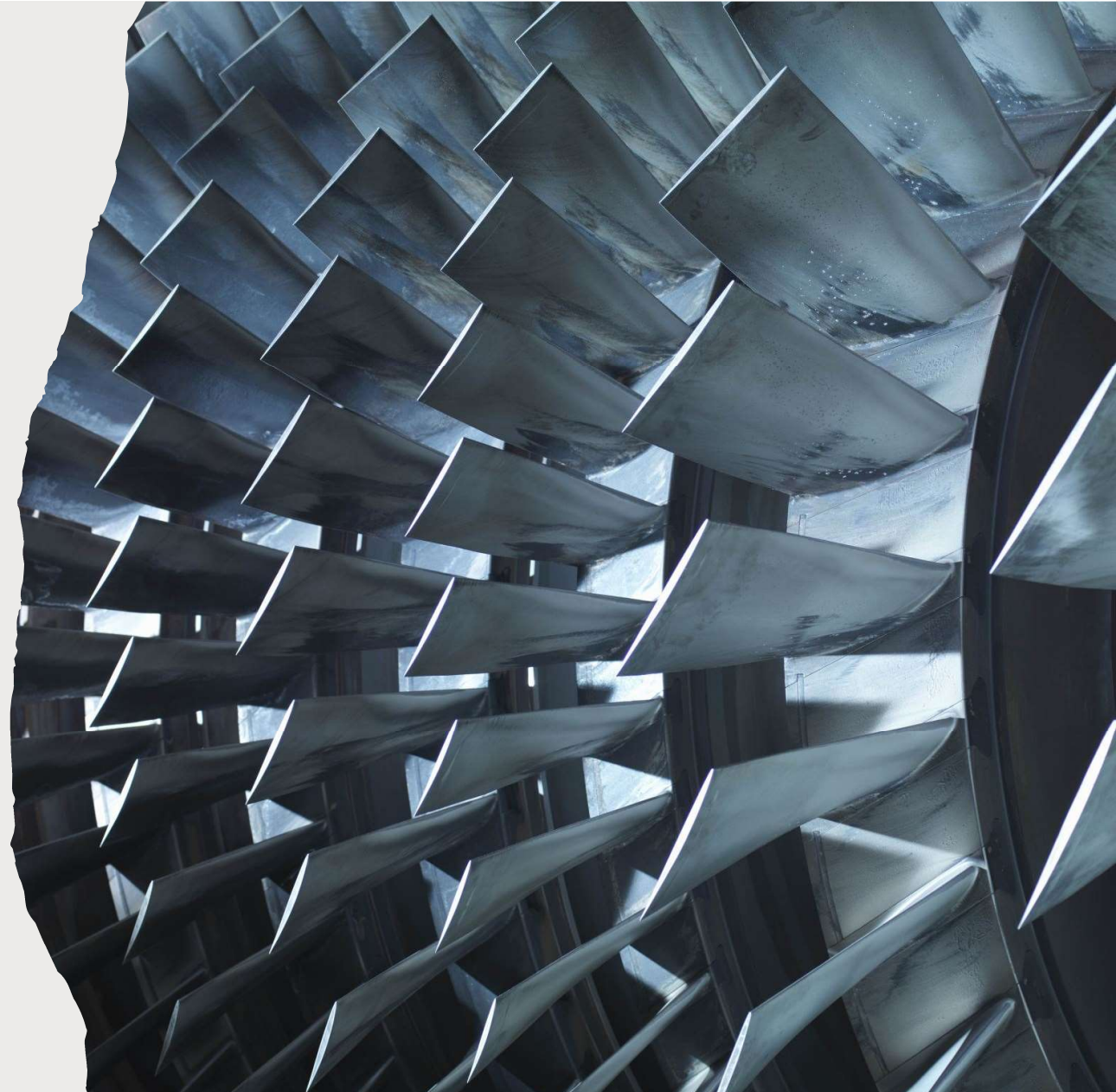
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CCMI 184 Hearing. *Anticipation
of structural industrial change*

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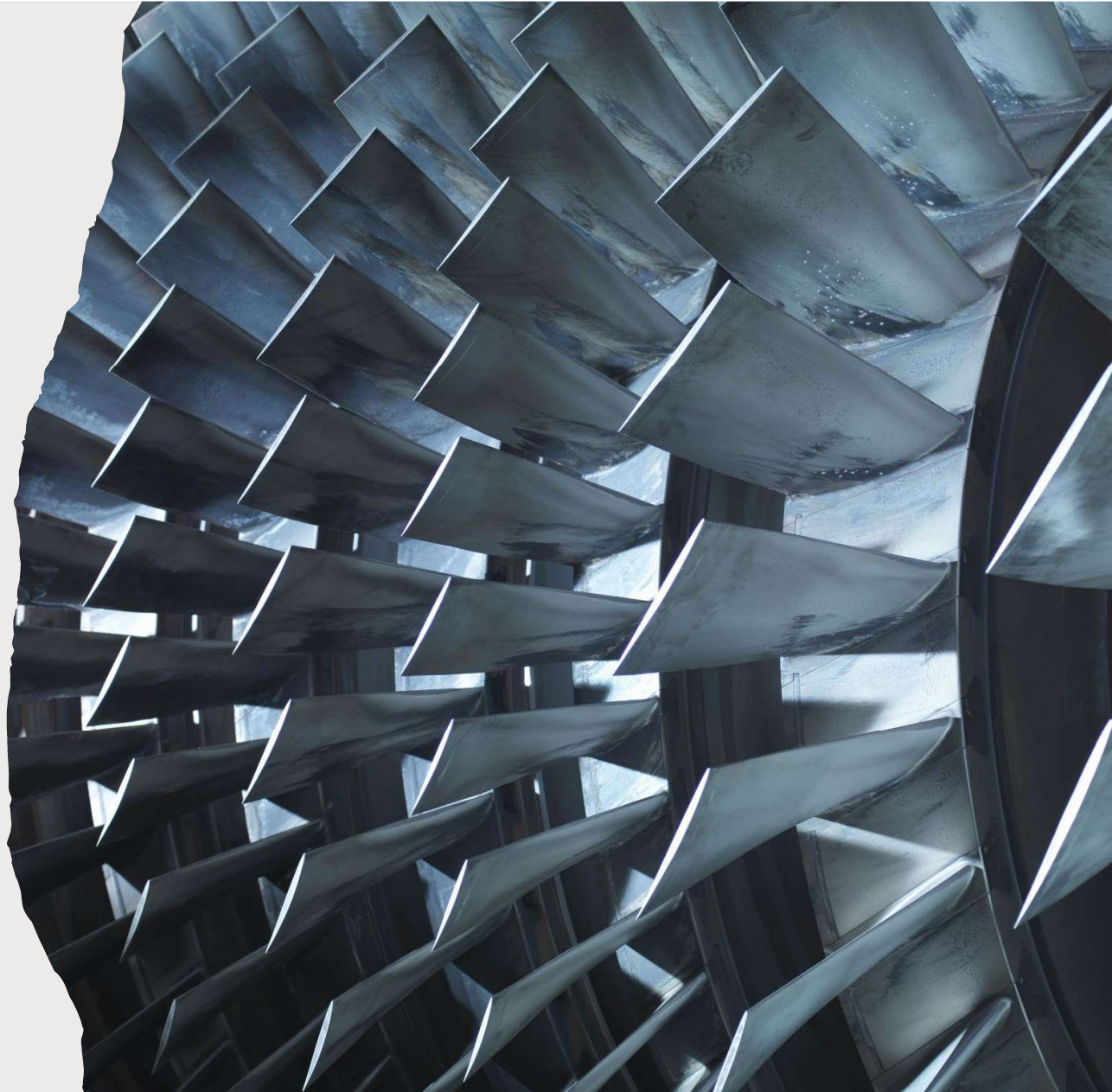
HOW IS TECHNOLOGICAL
CHANGE AFFECTING
AEROSPACE?

- **Uncertainty** about the trajectory of technological advances
- **Complexity** in integrating advances in aeroengines, digitization and new materials
- **Risk**, because technology investment is expensive and success is not guaranteed
- **Restructuring supply chains** to make them more secure and easier to manage (e.g. offshoring, reshoring)



WHAT CAN FIRMS,
GOVERNMENTS,
UNIVERSITIES AND SOCIAL
ACTORS DO TO RESPOND
TO THESE CHANGES?

- **Understanding and anticipation are vital at 2 levels –**
- **1. Understand technologies and supply chains globally,** to understand what is happening and on what timescales
- **2. Understand clearly the competitiveness of your own firm and/or regional ecosystem.** Ask what is needed to enhance our competitiveness/value added.
- **Organization.** The strongest aerospace regions are well organized and involve a wide range of stakeholders (firms, technical colleges, regional governments, unions, universities). Collectively a regional aerospace cluster can provide critical services and facilities that many of its individual members cannot



UNDERSTANDING,
ANTICIPATION AND
ORGANIZATION CAN ENABLE
A REGION, A FIRM OR A
SOCIAL ACTOR TO
ANTICIPATE TECHNOLOGICAL
CHANGE

- **For example, human capital developments can be made to prepare for new technologies...**
- Not just obvious ones, like training **systems engineers** to manage digitization

...but also

Engaging **schools** to ensure students have a strong grounding in **STEM subjects**

Ensuring **firms have** not only technological competence, but also **the managerial and commercial skills expected in global supply chains**

Developing the **industrial culture and values** expected by the aerospace industry from its suppliers

