

Facts and Figures, Clusters in Schleswig-Holstein (SH) and Hamburg

Aviation, Aircraft Industry

Subject	Comments	Facts and Figures
Cluster focus		Aviation cluster Hamburg/Northern Germany (a) Aircraft industry (b) Aviation
Type of network	Network, cluster, competence centre	Cluster
Cluster type (I)	Technological, innovative, tertiary	(a) technological (b) tertiary
Cluster type (II)	Industry, technology, value added chain	(a) Aircraft industry with equipment, maintenance, installation (b) Airports, air freight, logistics
Cluster type (III)	Established, growing, emerging, as vision	emerging, partly in start-up phase
Common ground		Aviation
Industries		Aircraft industry, measuring and control instruments, Equipment: several industries involved Aviation, logistics
Adjoining clusters	Intersection with other clusters	Logistics Cluster Maritime Cluster (e.g., aircraft cabin interior similar to those of ferry and cruise ships)
Specialization		Cabin Interior Systems Life cycle of aircrafts: maintenance, repair, overhaul, modification; Innovation in Fuel Cells "Efficient Airport 2030"
Cluster-Management		HH: Hamburg Senate, Office for Economy and Labour (Department Aviation Cluster)
Network supporting or cluster promoting facilities, events		Initiative "Aviation Location Hamburg-Northern Germany" Hanse Aerospace (Association of Suppliers) (HH) Hanseatic Engineering & Consulting Association HECAS (Association for engineering services in HH) Exhibitions: Aircraft Interiors Expo (HH)
Main cluster agents for a complete cluster	Key enterprises	Airbus (biggest firm in HH), Lufthansa Technique (HH) Hamburg Airport
	Qualification institutions	In General: Hamburg is global leader in training for technical aviation jobs HCAT Hamburg Centre of Aviation Training (supported by public organizations and aerospace companies) Lufthansa Technical Training (HH)
	Qualification and research (Universities)	TU Hamburg-Harburg (Centre for Aviation Research, Cabin Systems) HAW University of Applied Sciences (HH) (e.g. Cabin Interior Systems) Helmut Schmidt-University (HH)
	R&D (Institutions)	ZAL Centre for Applied Airspace Research (HH) Technology Centre Hamburg-Finkenwerder
	Business and financial services	Hanseatic Engineering & Consulting Association (association for engineering services)
	Additional firms (examples)	Many small and medium-sized supplier firms (about 300) in Hamburg and in the surrounding area (SH, Niedersachsen)
Cluster size	Employees and firms	HH: 27.200 employees (130 firms), incl. More than 20 thousand employees at Airbus. SH: 2,300 employees (75 firms)

Regional focus		HH: Hamburg is world's No. 3 in aircraft industry (following Seattle and Toulouse), specialty: cabin interior construction
Regional significance		In Hamburg most important industry, aviation industry became leading industry in Hamburg and around the metropolis. In the hinterland of Hamburg increasing importance, particularly in the North of Niedersachsen. In the southern Schleswig-Holstein increasing participation in the cluster.
Regional identification		Currently still limited to Hamburg.
Competitive situation, perspectives		Growing employment at Airbus and at the suppliers over the last years (figures for regional suppliers: 2005-2008 plus 3,000 jobs) Network is dominated by few core firms with location in Hamburg, stability of the cluster depends on it. Principally positive long-term outlook on the world's aviation market, but strong political influence.
External relations		Benefits of strengthening connection to maritime cluster (e.g. cabin systems for aircraft and passenger ships) Regional link to Airbus Toulouse
Further Comments		Aviation Cluster of the Hamburg metropolitan region is one of five winners of the German competition "Cluster of Excellence"
Sources	Reports, Expertises, Internet-Information	Sources (see list): 1, 9, 11, 14