.AGORIA

Technology for a better world

Our contribution to a sustainable future

FIRST SUSTAINABILITY REPORT FROM THE TECHNOLOGY INDUSTRY

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www.technologyforabetterworld.be

Introduction

This report is the first sustainability report from the technology industry in Belgium. It came about through a cooperation by and between Agoria, our members and our stakeholders. With this report, we fulfil our responsibility to communicate transparently on the sustainability strategy and impact of our sector.

The report can be considered as a baseline measurement, the indicators and data of which we will continue to supplement in the coming years. With our sustainability report, we want to inspire companies within and outside our sector to integrate sustainability even more into their business operations.

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Interview with CEO Bart Steukers

“Sustainability is becoming more important than ever”

Technological innovation for a better and more sustainable society has been the core business of Agoria and the technology industry for years. Together with its member companies, Agoria is now launching a joint sustainability strategy. With its first sustainability report, the organization is also setting the tone for systematic impact monitoring of the technology industry. Bart Steukers, CEO of Agoria: “Committing to sustainable change will be the decisive factor for the future of our companies.

Impact is the key word in your strategy and report. How can and will the technology industry create impact?

"Impact has a double meaning for us. Firstly, we are not too shy about sweeping up on our own doorstep. Some of our activities contribute to climate change or environmental pollution, which we cannot deny. As an employer, we also have an impact on people's health and well-being, and in some cases it can be negative. We take responsibility for reducing negative impact on people and the environment wherever it occurs."

"Equally important when it comes to impact is the lever that the technology industry holds to enable and drive sustainable change. Technological solutions provide answers to just about every social challenge, from climate change to an ageing population. Electric cars, charging infrastructure, heat pumps, components for mega windmills, recycling of critical metals, Mobility as a Service, smart traffic infrastructure, tools and apps that help the elderly to be independent for longer: the ways in which the technology industry can help to sustainably improve our society are legion. With our sustainability strategy, we want to use all these technological innovations in an even more focused way in those areas where we can make the biggest difference. The greatest possible value creation, both economic and social, is what drives us."

Does this sustainability strategy mean a turnaround for the technology industry?

"You should not forget that sustainability is not at all new to our sector. The technology industry has been focusing on sustainable business for years. Over the years, Agoria has launched various initiatives on subjects such as the circular economy and diversity. A good example of this is Be The Change, our programme on talent, diversity and sustainable employment. Those kinds of initiatives remain important, but today we want to go a step further. With this strategy, we are anchoring the sustainable transition in our sector even more formally."

"The Belgian technology industry can be an enormous lever for the global transition. This is a responsibility that we want to fully assume, but also a huge opportunity for our sector: the sustainable transition is an unprecedented opportunity. With our strategy, we therefore also want to encourage our member companies to get to grips with sustainability and to invest in it now in order to be resilient and future-proof in the future."

What are the biggest challenges for the technology industry?

"The pressure of the climate crisis is of course enormous. The European Green Deal requires companies to be part of the solution and that is a good thing. We need to help companies to take their responsibility by reducing their emissions. In addition, we want to maximize our leverage to use technological innovations to reduce the emissions of others and make a massive switch to renewable energy. With the Digital for Climate study, for example, we are mapping out how the digital industry can make other sectors, such as the construction industry, more sustainable from the inside."

"The urgency is almost as great in the area of talent. Everywhere on the labour market we see shortages. If we want to make the green transition a reality, we have to solve that problem. How do we ensure that more people opt for a job in the technology industry? How can we get talent to the companies more

easily? How do we fill bottleneck professions? How do we promote sustainable employment? We have formulated twelve impact domains in all, but these two seem to me to be the greatest challenges. We have noticed that awareness of these themes has increased considerably in the companies, but more is still needed."

How does the crisis in Ukraine affect those challenges?

"The coronavirus pandemic and now the Ukraine crisis have created an unprecedented global commodity and energy crisis. Inflation, historically high energy prices, reduced availability of raw materials and products, Europe's dependence on other regions when it comes to certain critical materials: all these trends make the green, circular and digital transition even more crucial. Although certain subsectors and companies are currently struggling, which affects me personally, I am convinced that current events make the sustainable transition even more necessary, also to keep our companies competitive. Our companies have shown considerable resilience during the coronavirus crisis: they have proven that they can move quickly to survive economically and that they are there for their people in times of crisis."

Your sustainability strategy has been charted in a concrete and transparent way: each ambition is accompanied by concrete commitments. Using a comprehensive set of indicators, you want to show the outside world both your progress and the margin for improvement in the coming years.

"Credibility is particularly important to me. If, as an industry, you call yourself part of the solution, then you must also have the courage to formulate measurable ambitions. In recent months, we have been working extremely hard on these concrete commitments with our management and our governing body – a representation of more than 30 companies that reflects the technology industry. We set the bar high, but at the same time we want to be realistic; greenwashing is not for us. We have been critical of ourselves: Where are we today and where do we want to go? What are we already doing well and in what areas do we need to do better?"

'The sustainable transition is an unprecedented opportunity. With our strategy, we want to encourage our members to get to grips with sustainability.'

Bart Steukers – CEO

‘If as an industry you call yourself part of the solution, then you must also have the courage to formulate measurable ambitions.’

Bart Steukers – CEO

“To be credible, transparency is essential. With this first report, we want to be open about what we have already achieved, but also modest, in the sense that we also show that we are not yet where we need to be. We present things as they really are, not in a more positive light. We want to take steps in the areas where we are not yet far enough for subsequent reports. For every negative impact of the sector, we from Agoria try to formulate constructive proposals and solutions to make companies in our sector take steps in the right direction. At the same time, it is our intention with this report to make the sustainable contribution of technological innovation explicit and to communicate it clearly, so that we can also inspire others.”

Is this sustainability strategy also a signal to the people working in the technology industry?

“It is indeed, for we also want to be accountable to our own people. People want to know what companies and their employers are doing to address their environmental impact, how they are contributing to solving social problems and where their positive impact lies for people and the planet. To attract people and keep them in our sector, both sustainability and clear communication are becoming key success factors. At the same time, we want to inspire our people and get them on board. We want everyone to feel part of our sustainability story and find out for themselves how they can contribute to it. With the strategy we are launching today, we want to create even more drive in the sector. This inspiration will then spread beyond the sector to other sectors, companies, stakeholders and people who work with us.”

Your sustainability strategy and first report are an important milestone. How are you going to continue with this?

“It is work in progress and will remain so. We have written down our ambitions, so that we know where we want to go. We have set a reference point to monitor our progress in the coming years. That all this is now on paper is an important first step. But that is not the end of the race.”

“In the coming years, it will come down to further evolving towards the technology industry of the future, in its best form. We must dare to adjust or adapt our ambitions in the coming months and years. Sustainable business is not a static story, we must constantly question ourselves.”

Does the sustainable transition also bring changes for Agoria?

"The next step is to integrate our sustainability strategy into all our plans, programmes and projects. We are therefore engaged in a thorough thinking exercise: What should we focus on with our sector organization? How do we best support, facilitate and encourage our members in that sustainable transition? How do we want to cooperate with our partners and stakeholders? Sustainability must start living in our organization once and for all. It will become an inseparable part of our operation."

"We will develop our sustainability services further and focus on the needs within the companies. Encouraging, reaching out to and supporting our members to take on sustainability challenges and achieve imposed or self-imposed goals will constitute the common thread running through our operations in the coming years."

What are the next steps and milestones?

"Our Agoria annual event in May will focus on the commitments in this report and the actions we are rolling out to achieve our ambitions. Just as in this report, we will also pay plenty of attention to inspiring cases of our companies in the communication in the run-up to the annual event. We want to motivate, inspire and support our companies to take further steps by showing what efforts the sector has already made. If it turns out that the companies follow our sustainability story and formulate strong ambitions for themselves, our story will be that much stronger. That will ensure that we can only show more impact and stronger cases in the coming years." ■

"Improving quality of life' is what Agoria stands for and it is also the goal of sustainable entrepreneurship. With our sustainability story, we want to connect everyone who is inspired by technology. We are committed to supporting our member companies as best we can to operate sustainably in society. And last but far from least: with our technological solutions, we contribute to increased prosperity, more well-being for people and a better planet."

René Branders – Chairman of Agoria

About Agoria

The technology federation Agoria exists since 1946 and brings together more than 2000 technology companies and everyone who is inspired by technology. With 321,000 employees, the technology industry is a leading industrial sector in Belgium. Some 70% of Agoria's members are SMEs. Agoria's services and points of view are about digitalization, the manufacturing industry of tomorrow, talent policy and training, market development, regulation, infrastructure, climate, environment and energy. Agoria wants to connect everyone who is inspired by technology and innovation and wants to increase the success of companies and shape them in a sustainable way.

More information on agoria.be.

AGORIA IN FIGURES

MEMBERS

More than 2,000 technology companies from the manufacturing industry, the digital and the telecom sector

70% **SMEs**

PERSONNEL

184.9 FTE **193 employees**

93 Women

100 men

(Agoria personnel figures 30/11/2021)

About the technology industry

The technology industry boasts more than 15,000 employers in the Belgian industrial landscape. The activities are very broad: applications for aerospace, energy technologies, innovative solutions for construction, technology for safety and security, infrastructure and technology in the context of mobility, telecom companies and digital industries. The technology industry also includes companies responsible for the first processing of metals and manufacturing companies that produce, assemble and sell machines, installations, sensors, etc. Finally, the technology industry also includes service companies that provide technical, creative and innovative services.

EMPLOYMENT

Number of employers	15,359	(Q4, 2019)
Numeber of employees	315,000	(Q1, 2021)
Number of self-employed	25,000	(2020)
Situations vacant	15,860	(2021)

THE TECHNOLOGY SECTOR IN FIGURES

RESEARCH & DEVELOPMENT

Expenditures

1.84 billion euro (2019)

R&D personnel 14,353 FTE (2019)

FINANCIAL

Turnover €	137 billion	(2021)
Added value €	37.5 billion	(2020)
Export €	80 billion	

Our strategy

‘Technology for a better world’, our contribution to a sustainable future

To provide a response to current global challenges such as digitalization, the creation of prosperity and well-being, the climate crisis and the call for a sustainable, circular economy, the technology industry has charted its own sustainability strategy: ‘Technology for a better world’.

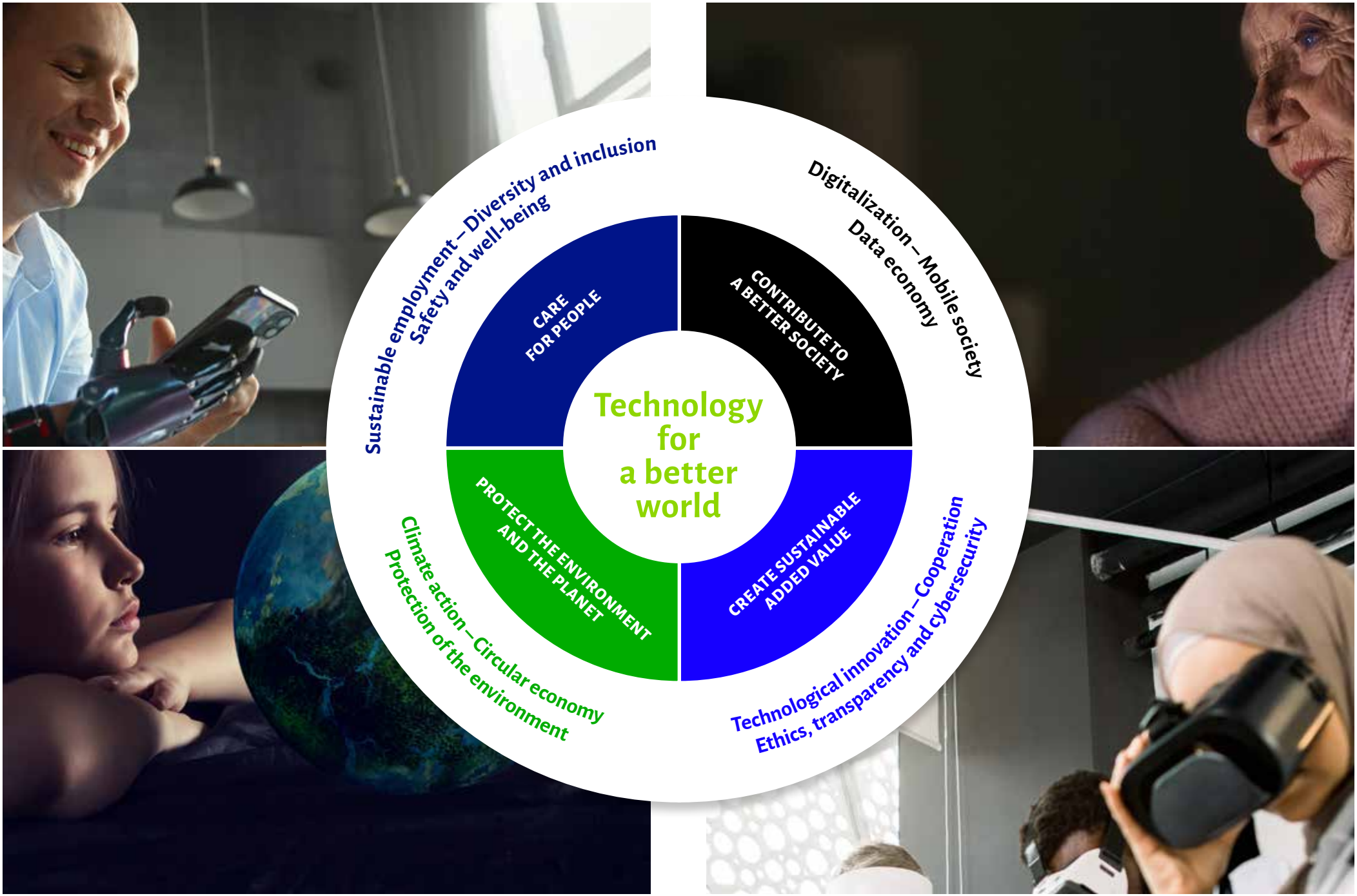
As a technology industry, we want to be part of the solution and help shape the sustainable future of people and planet. With our sustainability strategy, we are committed to reducing our footprint and to mitigating further the impact of our sector on people and the environment. At the same time, we are committed to creating as much added value for society as possible through what makes our sector unique – technological solutions. Through these two tracks, we contribute to the European Green Deal and the Sustainable Development Goals of the United Nations.

Ambitions and commitments

Four ambitions are central to our strategy, namely to

- care for people
- contribute to a better society
- protect the environment and the planet, and
- create sustainable added value

Each ambition comprises three impact areas, for which we have defined commitments and indicators.


Technology for a better world
CARE FOR PEOPLE
CONTRIBUTE TO A BETTER SOCIETY
PROTECT THE ENVIRONMENT AND THE PLANET
CREATE SUSTAINABLE ADDED VALUE
Sustainable employment – Diversity and inclusion
Safety and well-being
Digitalization – Mobile society
Data economy
Climate action – Circular economy
Protection of the environment
Technological innovation – Cooperation
Ethics, transparency and cybersecurity

Our contribution to the SDGs

With our sustainability strategy, we contribute to the Sustainable Development Goals (SDGs) of the United Nations. The SDGs are a global action plan to eradicate poverty, hunger and climate change by 2030, but also to achieve gender equality, good health and well-being, quality education and decent work for all. With our strategy, we subscribe to all 17 SDGs, but focus on the ones we have the most impact on:

We promote mental well-being at work (3.4). We pay attention to ergonomics and ensure a safe working environment throughout the supply chain (3.9).

We help match labour market supply and demand through training and create meaningful jobs. We are committed to increasing the participation rate in training (4.4). In addition, the technology industry wants to increase the digital knowledge of employees throughout the Belgian labour market (4.6).

We create a diverse and inclusive work environment by, among other things, working on the male/female ratio in the technology industry (5.1) and increasing the share of women in leadership positions (5.5).

We protect the environment by reducing our emissions to water (6.3, 6.6). Moreover, we reduce our water consumption and focus on water reuse (6.4, 6.5).

We bring our greenhouse gas emissions to zero by reducing our (direct and indirect) energy consumption (7.3) and switching to renewable energy (7.2).

We contribute to economic prosperity through technological modernization and innovations and by anchoring the manufacturing industry in Belgium (8.2). We create jobs and strengthen the labour market (8.3).

We make industry sustainable by modernizing infrastructure and facilities, developing innovative ESG technologies and tackling industrial processes (9.4). We invest in research and development to address societal challenges (9.5).

We are eliminating inequalities by increasing the digital literacy of workers across the Belgian labour market (10.3).

We develop technologies to make cities safer, healthier and more sustainable, for example through smart mobility (11.3). We are committed to the electrification of the entire company fleet and to increasing the use of alternative means of transport such as bicycles and shared scooters (11.2).

We make every effort to extend the life span of products and develop and implement product-service combinations according to the principles of ecodesign (12.1). We also focus on recycling to keep (residual) flows that cannot be avoided in the chain (12.5).

We reduce the climate impact of our products and services throughout the value chain and lower our emissions from freight transport, commuting and service trips by electrifying the company fleet and promoting sustainable means of transport. This way, we bring our greenhouse gas emissions to zero (13.3).

We protect the environment by reducing our emissions to air, soil and water to ensure the preservation of ecosystems (15.1).

We are transparent about our impacts and implement a code of conduct (16.6). With our technology solutions, we help both the technology sector and other sectors to protect their data (16.10).

We are committed to shaping new ecosystems and also participate in them as a sector organization (17.17).

How did our strategy come about?

Our sustainability strategy is based on an analysis of the material impact of the technology industry that we conducted in 2019. Both the impact on the planet and the impact on people and society were mapped out. The solutions with which the technology industry contributes to a more sustainable society were also part of the analysis.

In 2022, we will update our materiality analysis with a view to the next sustainability report.

Step 1: survey of stakeholders

A core group of 15 companies met three times in spring 2019 to determine the priority impact themes of the technology industry. The companies came from the manufacturing industry, the digital industry and the environmental and energy-intensive industry – the three subsectors of the technology industry. The participants mapped the impact of their business operations and assigned a weight to each impact. This resulted in a list of 20 topics that are relevant to the sustainability of the technology industry.

We presented this list of topics to 20 institutions and associations, such as governments, trade unions, an NGO and knowledge institutions. They checked whether the topics were complete, relevant and clearly defined. They evaluated, each from their own perspective, the selection of the material topics and the weight they were given. This process resulted in a list of 12 material topics.

How did our strategy come about?

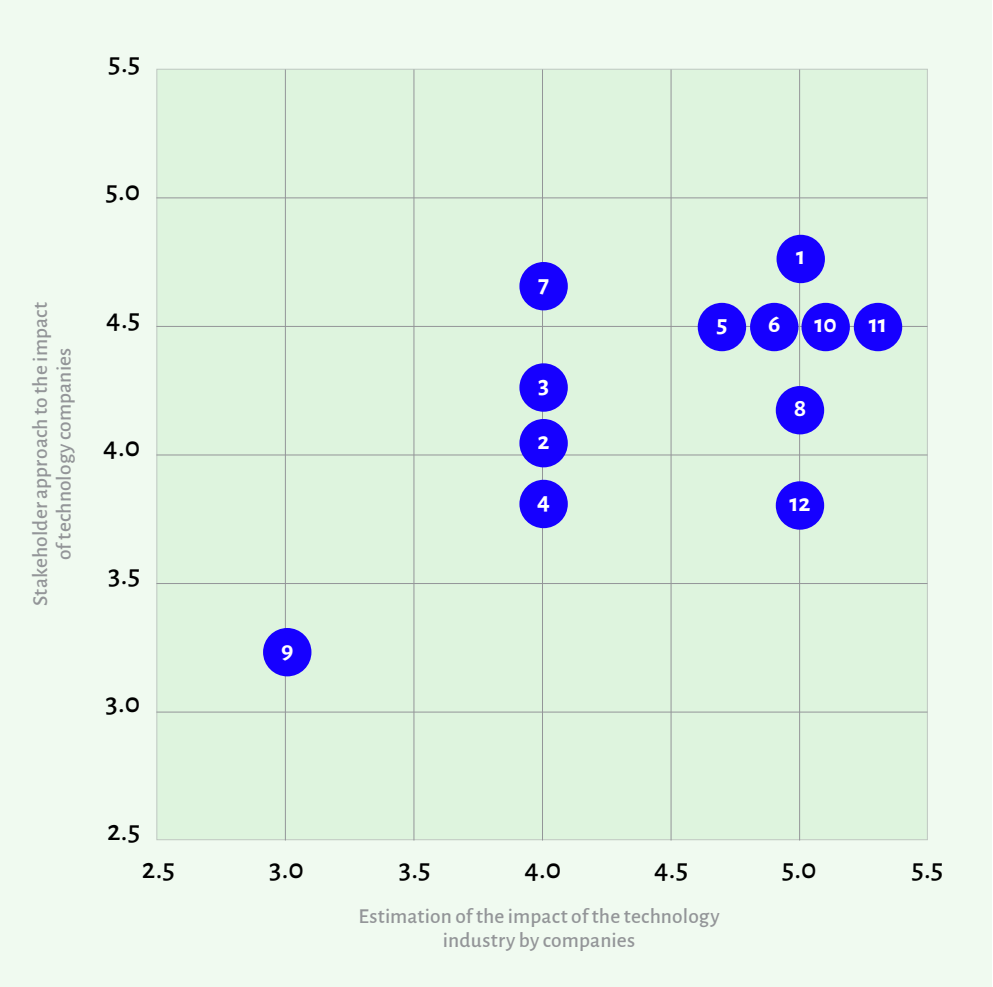
Step 2: creation of a materiality index

We drew up the materiality matrix based on the feedback from the stakeholders. The materiality matrix shows which impact domains are important for the technology industry and for the stakeholders involved and indicates the importance of each impact domain.

The materiality matrix shows that ethics, integrity and transparency, the impact of production processes on climate and environment, and the impact of technology on society and people, safety, health and welfare, circular economy and prosperity are the most important material topics.

The materiality analysis was financed within a subsidy project of MVO Vlaanderen. A description of the selection of stakeholders, their most important feedback and how we incorporated it into the strategy can be found in the annex on p. 123.

MATERIALITY MATRIX OF THE TECHNOLOGY INDUSTRY



1 Ethics and integrity **2** Diversity **3** Sustainable employment **4** Data management and privacy
5 Safety, health and well-being **6** Impact of technology on people and society
7 Impact of production processes on the environment and climate **8** Total product footprint
9 Mobility **10** Circular economy **11** Prosperity and well-being **12** Partnerships for a better world ▶

How did our strategy come about?

Step 3: development of a sustainability policy

In 2021, together with a group of six member companies, we developed the sustainability strategy based on the material topics. In order to take into account also the possible downside of far-reaching technological innovation, we added digital inclusion and transparency to the list.

We questioned six member companies about the ambitions, the ambition level and the commitments of the technology industry for each of the material topics in two workshops. This resulted in the strategy with the four ambitions as its foundation. The six companies were also given the opportunity to apply indicators to monitor the commitments.

We honed the storyline of each impact domain and defined the commitments (2025-2030) and indicators during several workshops with the Agoria board for the period January – February 2022. The commitments and indicators were presented to the governing body on 21 February 2022, whereupon some commitments were adjusted. The Agoria executive committee approved the final versions on 25 February.

First sustainability report

We want to inform our stakeholders about our progress on the sustainability front by means of sustainability reports. In doing so, we want to be transparent about the results we have already achieved and the environmental and social challenges our sector must continue to address.

This first report, which we are launching together with our sustainability strategy, is conceived as a baseline measurement. This baseline measurement does not yet include a dataset for a number of indicators. The monitoring of those indicators will commence in 2022 and will be addressed in our next report.

Inspire and connect

With our first sustainability report, we want to report, but also inspire. Throughout the report, we have included numerous sample stories of members who have embarked on the path of sustainable change.

With these cases, we encourage companies within and outside our sector to make their business operations more sustainable and to reduce their negative impact on people and the environment. At the same time, we want to stimulate companies to develop new technological solutions that help the world move forward and improve people's quality of life. This ambition fits seamlessly with the Agoria stated mission to 'Improve the quality of life' and our vision to shape the future in a sustainable way.

The launch of our first report forms the starting point for Agoria to communicate consistently about sustainability in the technology industry, in all its aspects. In this way, together with our members and stakeholders, we want to build an active community to work towards a more sustainable future.

AMBITION 1

Care for people

The technology industry is an important employer and wants to create and fill additional jobs in the coming years. We see it as our task to offer as many people as possible a valuable job in a healthy labour market, with attention for personal development and sustainable employability. By making our companies more diverse, we are helping to create a society where everyone is equal and at the same time increasing our competitiveness. The safety, health and well-being of our employees are our highest priority.

1. Sustainable employment

Why is this important?

The Belgian economy is picking up again and, as a result, the demand for suitable workers is growing even more than in recent years. At least 300,000 people must be activated by 2030 to maintain our level of prosperity. In order to speed up digitization and the green transition, companies are also faced with major changes, in which they also want and need to involve their employees. The study by Be The Change* shows that automation and digitalization make certain jobs redundant, but in a digitizing world and as a result of the green transition, a multitude of new jobs are also created.

We are therefore focusing on sustainable employment in the technology industry. This means that we create the right conditions for a long, healthy and happy career for our employees. It is crucial for people to know what competencies and skills they need, not only for their current job but also to be able to participate fully in the future economy. We see it as our responsibility as an employer to make people aware of the need to develop themselves with a view to the future.

To enable people to update their competencies and skills, we not only provide formal training and education, but our members are also developing into learning organizations where employees can learn at different times, in different forms and in different places.

Technology for sustainable employment

Technological developments help people to work on their own development and employability. They make it easier for people to take training courses and learn new skills. Distance learning, Massive Open Online Courses (MOOCs) and other online courses, digital learning platforms and 'blended' education are examples of this. Virtual reality, on the other hand, helps people undergoing training to practice the skills they have learned in a virtual-realistic environment.

Technological solutions such as augmented reality, exoskeletons or cobots (collaborative robots), operator support systems, serious games and digital assistance can support people with disabilities in tasks they would otherwise have difficulty performing, thus qualifying them for a particular job.

* In the Be The Change programme, Agoria exposes the changing needs on the Belgian labour market. These insights serve as a basis for governments, sectors, companies and individuals to shape their future HR policy. More information on agoria.be.

Commitments

- We create a net 40,000 additional jobs and fill them by 2030.
- We ensure that employees in our sector know what competencies are needed for their job in 2030 and that they receive the necessary training

Indicators

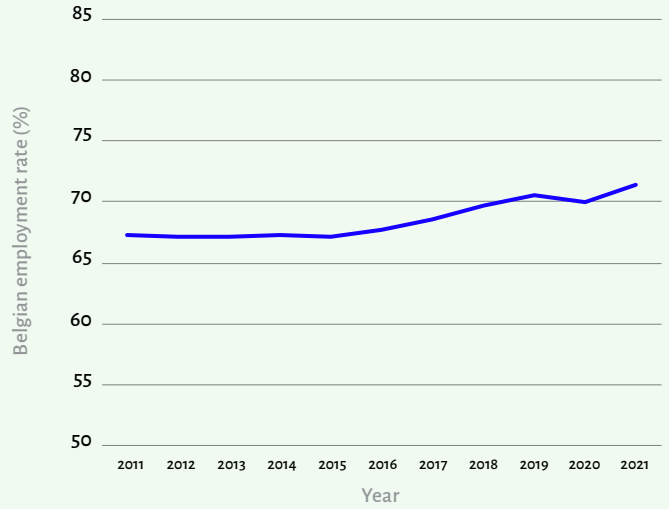
- Number of people aged 20-64 in work (Belgium)
- Number of people employed in the technological industry
- Number of vacancies in the technology industry
- Number of companies that have a programme or tool to identify the necessary competences of their employees

Where are we today?

NUMBER OF PEOPLE AGED BETWEEN 20 AND 64 IN EMPLOYMENT (BELGIUM)

In 2021, 71% of the 20-64 year-olds were in employment compared to 70% at the beginning of the coronavirus pandemic in 2020. In a context characterized by the pandemic, inflation, scarcity of talent and supply concerns, the Belgian employment rate recovered in 2021. Under normal circumstances, the Belgian economy could employ some 5,340,000 people by 2030.

Employment rate in Belgium (% of the population M/F/X 20-64y)



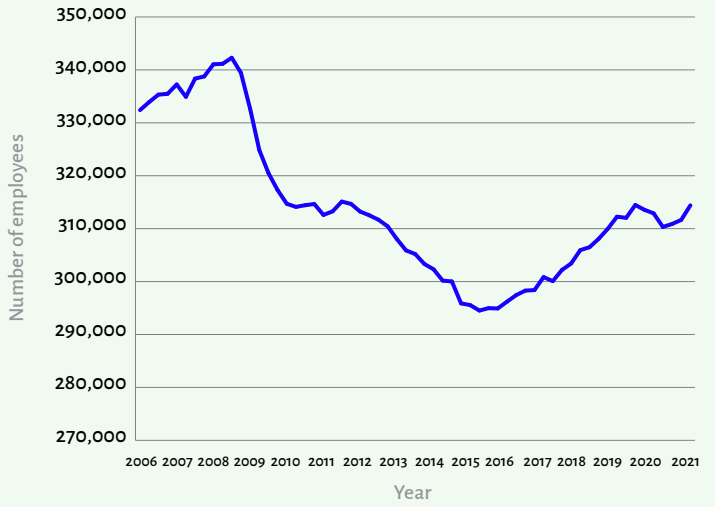
Source: National Social Security Office

NUMBER OF PEOPLE EMPLOYED IN THE TECHNOLOGY INDUSTRY

The technology industry currently employs around 320,000 people. We will regain the activity level we had before the pandemic, thanks to an activity growth of about 6% in 2021. The number of jobs increased by 2.5% in 2021, with 8,000 new jobs created and filled. This positive impact extends beyond our sector. In addition to our own employees, we also provide work for approximately 30,000 self-employed people and 25,000 employees from the temporary employment sector. Moreover, for every direct job in the technology industry, 0.8 jobs are created indirectly elsewhere in the economy.

We are committed to creating 16 net jobs in the technology industry every day between now and 2030. This means 40,000 additional jobs between the beginning of 2021 and the end of 2030. We can meet this commitment only if we can secure the sector's competitiveness and if enough talent is available to fill all the new jobs.

Number of people employed in the technology industry



Source: National Social Security Office

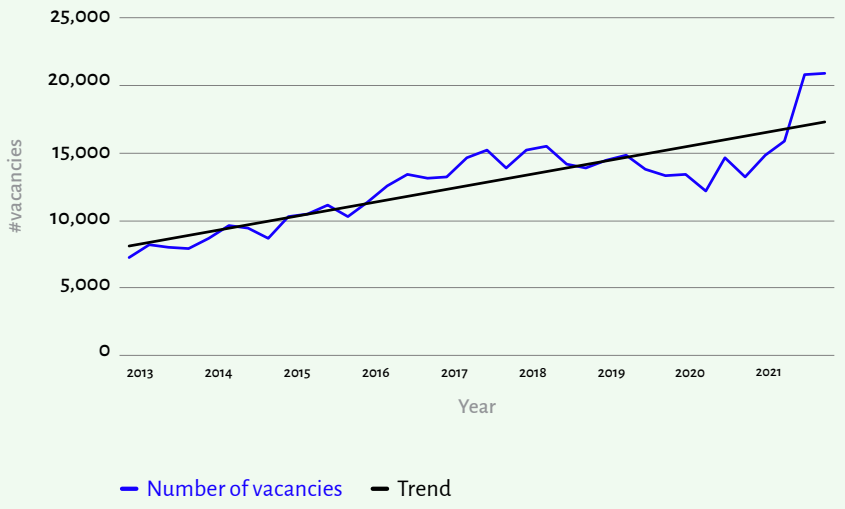
NUMBER OF VACANCIES IN THE TECHNOLOGY INDUSTRY

The technology industry's faster and stronger-than-expected recovery from the coronavirus pandemic is reflected in an increase in the number of job openings. The number of unfilled vacancies has never been so high: in 2021 there will be more than 20,000 jobs to be filled in the technology industry.

NUMBER OF COMPANIES THAT HAVE A PROGRAMME OR TOOL TO IDENTIFY THE REQUIRED COMPETENCIES OF THEIR EMPLOYEES

We will monitor this indicator from 2022 onwards through a survey of our members.

Situations vacant in the technology industry (2013-2021)



Source: Job Vacancy Survey (Statbel)

READ MORE

Mirion

Development opportunities and sustainable jobs

Mirion develops and produces detectors of ionizing radiation. This SME has an innovative work organization and helps its employees actively to grow within the company. “We start from the question: what profiles do our people have? Who wants to grow in the company and what do they need to do so? Those who want to can be guided by a mentor, manager or colleague.”

READ MORE

Nokia Belgium

Nokia gets students excited about the technology industry during the Day of Pi

Every year, Nokia’s Belgian branch in Antwerp invites several hundred secondary school students to The Day Of Pi. During this interactive school visit, students are shown around and receive an interesting lecture. In this way, the company wants to encourage students to embark on a mathematical or scientific track, in order to restore the balance of supply and demand on the labour market.

READ MORE

Siemens

Lifelong learning makes company and employee future-proof

Digitalization makes lifelong learning necessary for companies and employees. With its learning platform ‘My Learning World’, Siemens encourages its employees all over the world to learn continuously. It was the first to receive the ‘Employer ready for the future of work’ label from Agoria.

2. Diversity and inclusion

Why is this important?

As a technology industry, we want to contribute actively to a diverse society. We want to give everyone equal opportunities, irrespective of gender, age, ethnic or cultural background, disability, religion, political beliefs, pregnancy or parenthood. In our companies, throughout our supply chains and in society, we want to remove barriers to equality.

There is too little diversity in the technology industry at this time. The under-representation of women is a particular concern in our sector. Belgium has no shortage of educated women: worldwide, but also in Belgium, more young women than young men study at university. Encouraging women and companies and giving them the opportunity to contribute together to more diversity is a social issue that is at the top of Agoria's agenda. After all, by balancing the male-female ratio, we will also be able to tackle the other diversity topics.

Attention to social equality is not only an ethical choice, it is also an economic necessity. In stark contrast to the lack of diversity, our sector currently has more than 20,000 vacancies. As a result, our companies cannot attain the full potential for growth and therefore for our prosperity. By embracing diversity, we want to fill the increasing demand on the labour market with new profiles. More and diverse talents must find their way to our sector.

Diversity also strengthens the prosperity and competitiveness of our companies. Only if the business world reflects society can products and services meet the needs of diverse consumers optimally. In companies with diverse teams and an inclusive work environment, employees are more engaged and motivated as well as happier, which leads to higher productivity. Diverse teams are more creative and innovative by connecting different backgrounds, talents and insights.

Commitments

- We aim for an annual improvement in the male/female ratio in the technology industry. We strive for gender equality in recruitment and promotions and aim for 25% women in leadership positions by 2030.
- We support activation paths for older employees, young women and NEET young people*.

* NEET young people (not in education, employment or training) are young people between 15 and 24 who have not been in education in a four-week reference period, are not in regular education, are not in training outside regular education and are not at work (even as a working student).

Indicators

- Number of women in leadership positions
- Male/female ratio in the technology industry (Belgium)
- Age pyramid in the technology industry (Belgium)
- Number of initiatives launched to promote digital competencies

Where are we today?

NUMBER OF WOMEN IN LEADERSHIP POSITIONS

Only 10% of CEOs and founders of companies in the technology industry are women. Listed companies in Belgium are required to have at least 30% women on their board. Nevertheless, we notice that this does not lead to a higher representation of women in leadership positions in our sector. So there is still a lot of room for improvement.

The 'Level IT out' of the European Social Fund shows that diversity is high on the agenda of most companies in our sector (inclusionatwork.be – to be launched later this year). More than 50% of companies indicate that they are taking action to make their company more diverse and inclusive. In particular, increasing the number of women in leadership positions is mentioned as an action point.

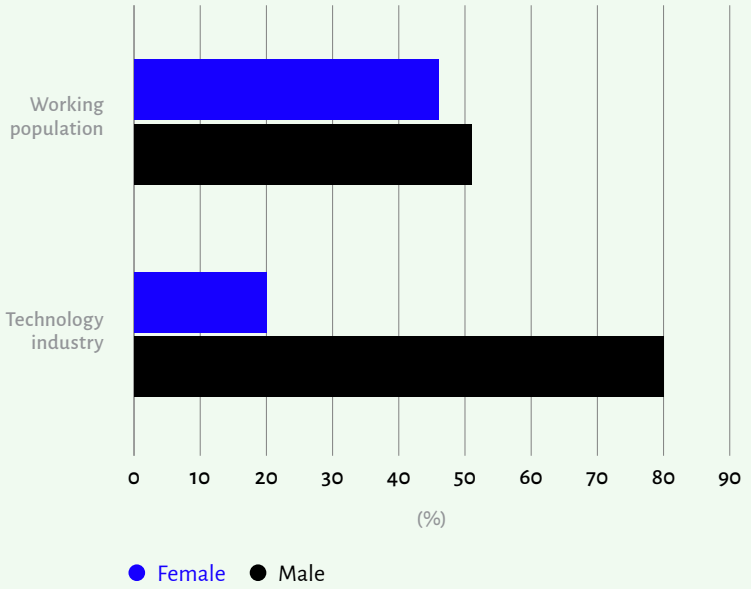
Not only is attracting female talent a challenge, but also retaining it. Half of the women who enter the technology industry leave before they are 35 years old. A corporate culture in which women also feel at home, a transparent pay policy and a documented evaluation and promotion process increase the chances of women staying in the company. We want to focus on this in the coming years.

MALE/FEMALE RATIO IN THE TECHNOLOGY INDUSTRY (BELGIUM)

In the Belgian working population, the proportion of men to women is evenly distributed: about 51% men and 49% women. In the technology industry, 80% of the employees are men and 20% are women. This ratio has hardly changed in the last ten years (82% men in 2011 compared to 80% men in 2021). If we look at the technology industry without the digital sector, the proportion of men is even slightly higher, at 84%.

In April 2019, Belgium signed the Women in Digital Declaration and in 2021 the national and intersectoral strategy 'Women in Digital'. With this, the federal and regional governments, social partners and a number of companies commit to jointly promote the influx and retention of women in the digital industry.

Male/female ratio in the technology industry in 2021 (Q1)



Source: National Social Security Office

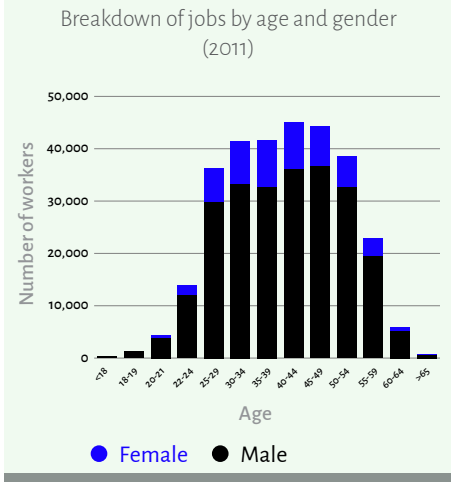
AGE PYRAMID IN THE TECHNOLOGY INDUSTRY (BELGIUM)

There has been a shift in the age of employees in the technology industry this past decade. In 2011, the age categories '40-44' and '45-49' had the largest number of employees. In 2021, the age pyramid is more evenly distributed, just like the pyramid of the entire working population in Belgium. This is due primarily to the large influx of young workers in the digital industry.

The number of workers in the digital industry has increased significantly in recent years. These are mainly young workers in the age categories '25-29' and '30-34'. The digital industry attracts slightly more women than the non-digital industry: just under 30% of employees in that sector are women.

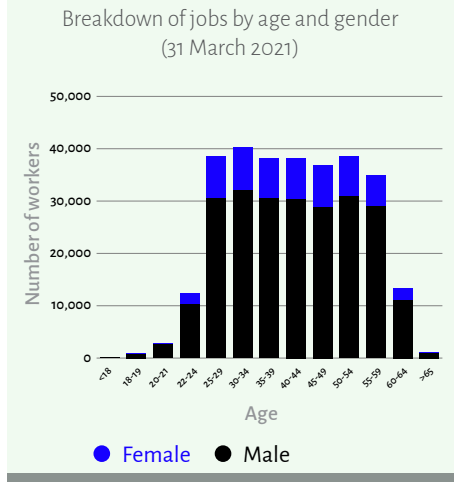
In the non-digital industry, the largest proportion of employed men is in the age categories '50-54' and '55-59'. At the same time, the inflow of young workers under the age of 30 into that sector is decreasing.

Age pyramid for the technology industry (2011)



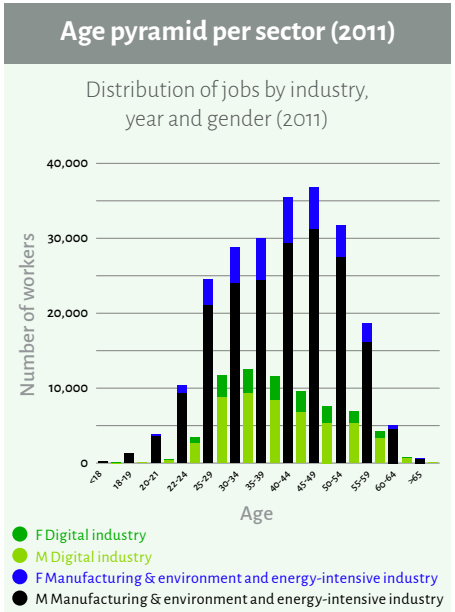
Source: National Social Security Office

Age pyramid for the technology industry (2021)



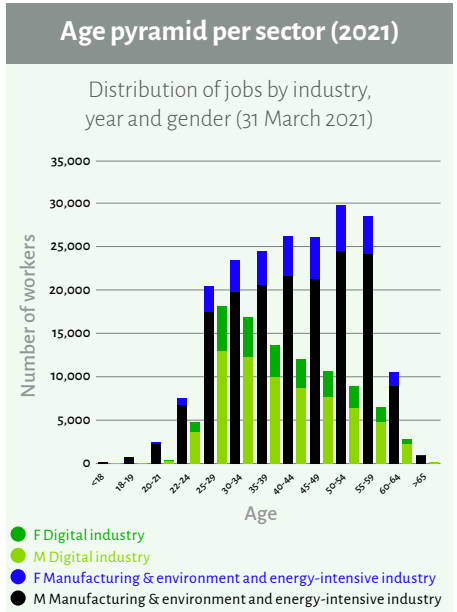
Source: National Social Security Office

Age pyramid per sector (2011)



Source: National Social Security Office

Age pyramid per sector (2021)



Source: National Social Security Office

NUMBER OF INITIATIVES LAUNCHED TO PROMOTE DIGITAL COMPETENCIES

We will monitor this indicator from 2022 onwards using the DigiSkills Belgium statistics.

READ MORE

Capgemini

Capgemini makes diversity a reality:
“All or employees must be able to be themselves”

Capgemini is a global player in consulting, strategy and technology services. The company considers diversity and inclusion to be of paramount importance. “People should be able to feel at home with us, irrespective of their gender, colour or background. This benefits their well-being and their motivation. If a customer has a problem with a colleague wearing a headscarf, we immediately make it clear that it is about the qualities of our employees.”

READ MORE

VINCI Energies

Diversity, inclusion and lifelong learning

Diversity and inclusion are key words in the personnel policies of VINCI Energies. Lifelong learning is also a priority: all VINCI business units spend 10 to 15% of their budget on training. “In our summer schools, employees who do not quite have the right diploma can brush up on, e.g. IT or automation in six weeks’ time.”

READ MORE

Serviplast

“People with a disability get the same opportunities with us”

Serviplast is a social economy company specializing in plastic injection that trains and supervises people with a disability continuously. The company is convinced that a disability is an opportunity to do things differently, but just as well. “To support our employees, we adapt the workplace to each disability profile and provide additional supervision during working hours.” Serviplast, a social economy company specializing in plastic injection, does not shy away from social challenges. 75% of their 160 employees have a disability. “Every employee has the right to a worthwhile job.”

READ MORE

CTG Circular

CTG Circular gives computers a second lease on life and helps underprivileged young people

CTG Circular gives used ICT material a second life. It prefers to take on ‘NEET youths’, young people who do not have a job and are not in education or training. The company is very active in Kenya, where it offers underprivileged young people a proper paid job.

3. Safety and well-being

Why is this important?

As an employer, we feel responsible for the safety and health of our employees. Accidents can also damage the environment and have a negative impact on business productivity. Occupational safety and health are therefore top priorities within the technology industry. Nevertheless, accidents at work and occupational diseases still occur every year in the technology industry.

Our companies do everything possible to prevent accidents and occupational diseases through prevention, risk management and safety management, at least in accordance with the legal requirements and applicable standards. In the manufacturing industry, machine safety, process safety and ergonomics require permanent attention, while in service companies the focus is on ergonomics. Companies also set up sports and exercise programmes to encourage their employees to adopt a healthy lifestyle.

In 2020 and 2021, the coronavirus pandemic was an additional challenge for safety management in our companies. Stimulated by the coronavirus measures, companies evaluated their internal rules and working processes thoroughly. This led to far-reaching adjustments to ensure the safety of employees and to allow them to continue their business: distance rules, mouth masks, organising disinfection rounds, working from home, contact tracing and raising employees' awareness of the coronavirus measures.

Increasing pressure on performance, unbalanced work-life balance, isolation during the pandemic, burn-out: as in many other sectors, people's mental well-being is an important concern in our industry, also after the pandemic.

Our contribution to a safer society

The technology industry is developing many applications and technologies that improve safety and ergonomics in business. For example, AI, the Internet of Things and cloud applications can help to monitor the use of equipment (in various industries), detect leaks (in heavy industries such as chemicals), increase driver safety (in logistics and transport) and so on. Virtual reality is increasingly used during safety training. Cobots take over work steps that are difficult, monotonous or dangerous from humans. Exoskeletons offer relief from heavy work and can prevent musculoskeletal disorders.

Technological applications also make society in general safer and healthier. For example, our companies develop solutions for safer traffic (intelligent traffic control, increasing safety in traffic tunnels, etc.) and better human health, such as high-tech medical equipment, Fitbits and all kinds of movement and health apps.

We want to give this matter our undivided attention in our sector by working out a prevention policy on psychosocial strain and organizing courses on stress and burn-out prevention and resilience training.

Commitments

- We are committed to improving the physical and mental health of our employees.

Indicators

- Frequency rate of occupational accidents in the technology industry
- Actual and overall severity rate of industrial accidents in the technology industry
- Total number of occupational diseases reported
- Absenteeism (longer than six months)

Where are we today?

FREQUENCY OF OCCUPATIONAL ACCIDENTS IN THE TECHNOLOGY INDUSTRY

The frequency rate, a measurement for the number of occupational accidents, is significantly lower in our member companies than the average in the Belgian technological industry and the entire Belgian private sector. In any case, the safety risks on the shop floor in our sector are less pronounced than in the chemical industry or the construction sector, for example. The frequency rate has fallen even further in recent years. In 2020, the frequency rate fell from 10.76 to 9.33.

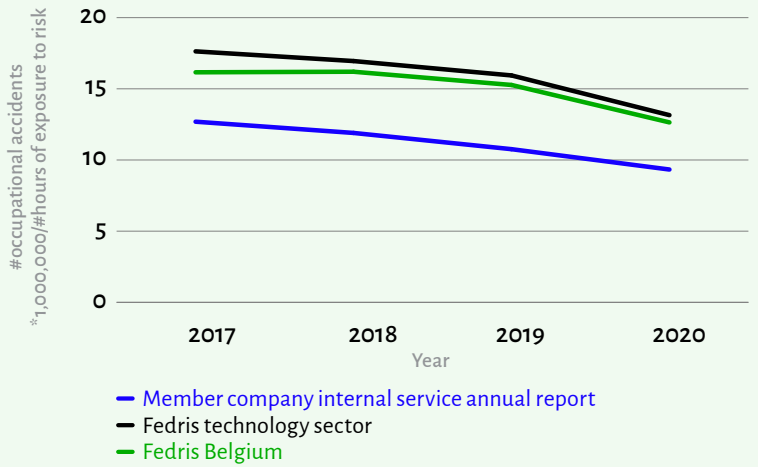
By focusing on prevention and by applying the latest technologies, our companies continue to work towards a safe working environment. It is therefore expected that the frequency rate of accidents at work will decrease further in the future.

In recent years, however, we have seen a rising trend in the number of accidents on the way to and from work. This increase is mainly due to the increase in (electric) bicycle traffic.

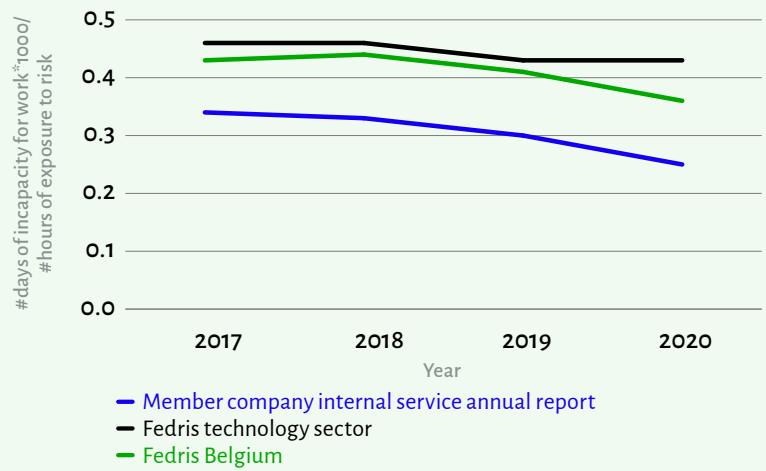
ACTUAL AND OVERALL SEVERITY RATE OF OCCUPATIONAL ACCIDENTS IN THE TECHNOLOGY INDUSTRY

The other accident indicators also show a downward trend. For example, the actual severity rate of occupational accidents at our member companies continued to decline between 2017 and 2020. In 2020, the accident severity rate fell from 0.30 to 0.25. The actual occupational accident severity rate takes into account the actual number of days an employee is incapacitated by an occupational accident.

Occupational accident frequency rate



Actual degree of severity of occupational accidents



Sources: Federal Agency for Occupational Risks (Fedris). Fedris Technological Industry, Fedris Belgium: Companies in all private sectors. Annual reports of the internal service for prevention and protection at work of Agoria member companies.

In 2020, the overall severity rate fell from 0.72 to 0.63, meaning that permanent disability continues to decline. The overall severity rate is a measure of permanent disability, including lump-sum days added for certain permanent injuries.

TOTAL NUMBER OF REPORTED OCCUPATIONAL DISEASES

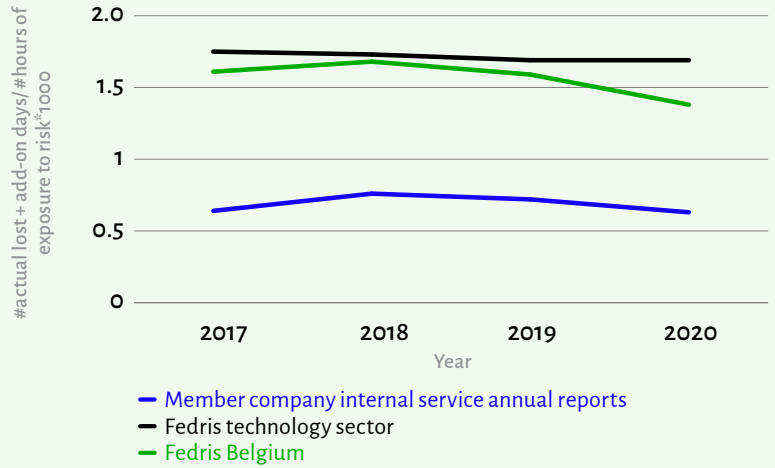
Occupational diseases are diseases that are directly caused by the exercise of an occupational activity or that are directly related to working conditions. Between 2013 and 2018, we see an increase in occupational diseases in the technology industry, also in relation to the number of national cases. This increase would mainly be due to a number of additional recognized occupational diseases, such as tendinitis.

The total number of reported occupational diseases in the entire industry in Belgium has fluctuated around 200 for some years now. In 2020, the total number of declarations in Belgium experienced a sharp increase. This is almost exclusively due to the recognition of coronavirus exposure as an occupational disease in the healthcare and education sectors. The share of the technological industry in the total number of declarations therefore drops sharply to 0.12%. If we exclude infections with the coronavirus, the decline initiated in 2019 continues.

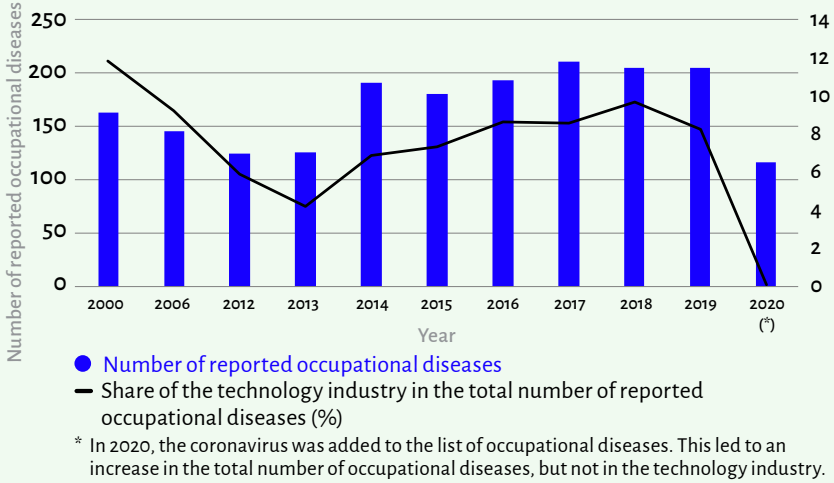
ABSENTEEISM (LONGER THAN SIX MONTHS)

We will monitor this indicator from 2022 onwards via the Fedris database.

Global degree of severity of occupational accidents



Total number of reported occupational diseases



* In 2020, the coronavirus was added to the list of occupational diseases. This led to an increase in the total number of occupational diseases, but not in the technology industry.

Sources: Federal Agency for Occupational Risks (Fedris). Fedris Technological Industry, Fedris Belgium: Companies in all private sectors. Annual reports of the internal service for prevention and protection at work of Agoria member companies.

READ MORE

Komatsu

Komatsu prevents accidents with virtual warehouse

Komatsu is active worldwide as a producer of construction machinery. Employee safety is given top priority with the help of digital technology. A virtual reproduction of the warehouse enables detailed risk analyses and innovative training methods. “You can show someone the perspective of the pedestrians and the forklift truck drivers and especially make clear what they do not see from that point of view.”

READ MORE

ABB

Towards zero occupational accidents and greater mental resilience

Thanks to a resolute policy, the number of occupational accidents at ABB is falling year after year. In other areas, too, the company has an eye on the physical and mental health of its employees. “We were forced to switch to structural teleworking due to the coronavirus. This enabled us to attain a better work-life balance, but our people missed the social contacts with colleagues. We organized resilience training to remedy that situation.”

AMBITION 2

Contribute to a better society

In today's complex and changing world, the technology industry wants to be a problem solver. We develop technology that accelerates the digitalization of society and supports the data economy. At the same time, we make efforts to limit the negative effects of digitalization. We are also creating digital applications that make traffic flow smoothly and help reduce congestion. To make our own mobility more sustainable, we are focusing on green company cars and modal shift.

1. Digitalization

Why is this important?

Digitalization is changing our economy and society at a rapid pace. It offers many opportunities to reduce manual operations and simplify processes, just think of online shopping and online banking. The Internet and the wide availability of APIs (application programming interfaces) and components have virtually eliminated distribution and production barriers worldwide, so that a Belgian software company can now easily sell products and services to, say, an Australian customer. Top universities can offer students worldwide the opportunity to take certain courses. Online banking is possible in places in Africa where physical banks do not yet exist.

Over the past decade, digital technologies have also become much more affordable, putting them within reach of every business. 5G will further accelerate the digital transformation of service and manufacturing companies, providing, for example, new opportunities to improve the customer experience, increase connectivity between machines or optimize inventory and supply chain management through continuous monitoring.

In order to maintain and strengthen their competitive position, it is important that our companies are at the forefront of digitalization and take full advantage of it. But digitalization brings many challenges, especially for our manufacturing companies. Digitalization has made the market much more mobile and competition can suddenly come from unexpected quarters. Classic car dealers, for example, no longer compete only with other brands, but also with car-sharing systems.

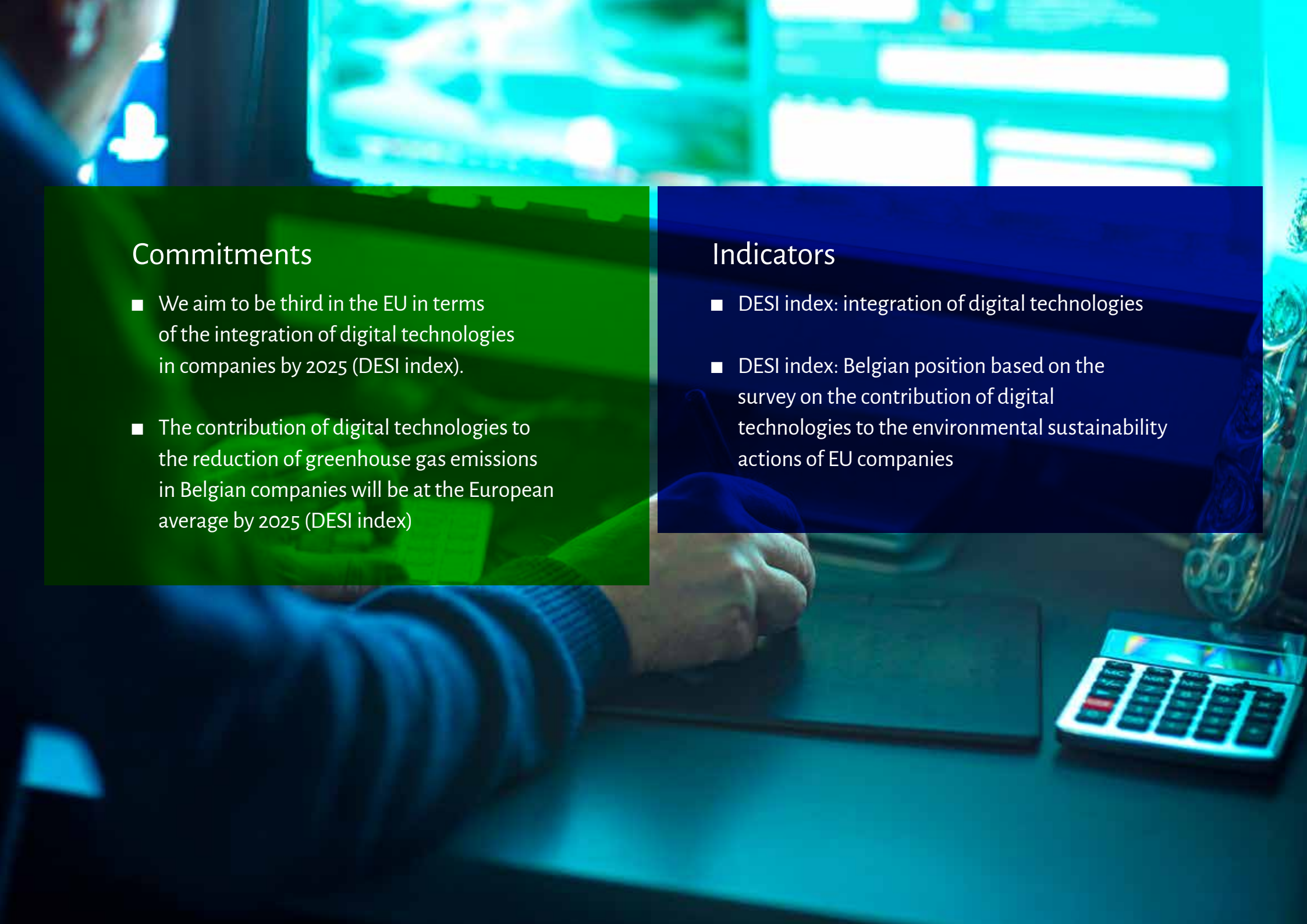
The increasing digitalization also increases the need for digital talent and technological profiles. People on the shop floor need to be trained to keep up with the latest digital developments. And there is a need for new profiles with strong technological skills, such as data engineering and cybersecurity. The labour shortage in digital areas is limiting the ability of Belgian companies to innovate and to profit from innovation. In 2020, 58.8% of companies recruiting or trying to recruit ICT specialists reported difficulties in filling ICT vacancies, according to the Be The Change study. Finally, inclusiveness must be at the heart of digital transformation: digital innovations must be accessible to all.


Mobile Banking
Customer ID
Password
LOGIN
terms and conditions

Digital technologies for a better society and a more sustainable world

Digitalization facilitates and improves our lives and provides answers to countless societal challenges:

- During the coronavirus pandemic, technology and connectivity made it possible to continue working and going to school while containing the virus. Digital technologies helped to monitor the spread of the virus and speed up the development of vaccines. The digital sector also plays a key role in the recovery of the economy after the pandemic.
- Digital technologies help to reduce CO_2 emissions and thus play an important role in tackling global warming and in achieving the objectives of the European Green Deal. According to a German study, digital technologies can contribute between 39 and 58% of the German CO_2 reduction targets by 2030, depending on the degree of digitalization. The reduction potential of technologies such as AI and the cloud appears to be particularly high in the manufacturing, mobility, buildings and energy sectors. Agoria is also currently mapping out the contribution of digitalization to reducing the Belgian carbon footprint with the 'Digital4Climate' study. With this study, we want to make the business opportunities of the 'twin transition' (sustainability and digitalization) concrete. The results will be published in the spring of 2022.
- Sensors and smart traffic lights can make our mobility more sustainable, while smart water meters allow us to detect water leaks. Smart grids, on the other hand, make it possible to collect energy in a decentralized manner, for example with solar panels, and to manage consumption intelligently. The evolution towards a superfast 5G network offers even more possibilities. For example, it allows self-driving cars to read traffic signs in real time or to communicate with other cars.
- Digital technology enables companies to optimise their production processes, innovate and develop new services. Increasing digitalization also facilitates the shift to a service economy, in which companies offer (online) services instead of products. Well-known examples are digital banking or Mobility as a Service (MaaS), where a private car is replaced by a mobility subscription. Such service models only exist by the grace of digital technology. For example, it allows for the reservation of vehicles, but also for the monitoring of devices and predicting when they will need to be serviced.
- Digital technologies are essential to improve healthcare, whether it is telehealth, primary care, diagnostics or determining therapies. In healthcare, we are seeing a shift towards 'disease management' through apps and other digital gadgets. Whereas doctors used to be able to cure a patient or not, today they can remotely monitor and control chronic diseases such as heart disease, cancer or diabetes. This reduces the pressure on doctors and caregivers. More than 200 of our members are developing health tech and making a real difference.



Commitments

- We aim to be third in the EU in terms of the integration of digital technologies in companies by 2025 (DESI index).
- The contribution of digital technologies to the reduction of greenhouse gas emissions in Belgian companies will be at the European average by 2025 (DESI index)

Indicators

- DESI index: integration of digital technologies
- DESI index: Belgian position based on the survey on the contribution of digital technologies to the environmental sustainability actions of EU companies

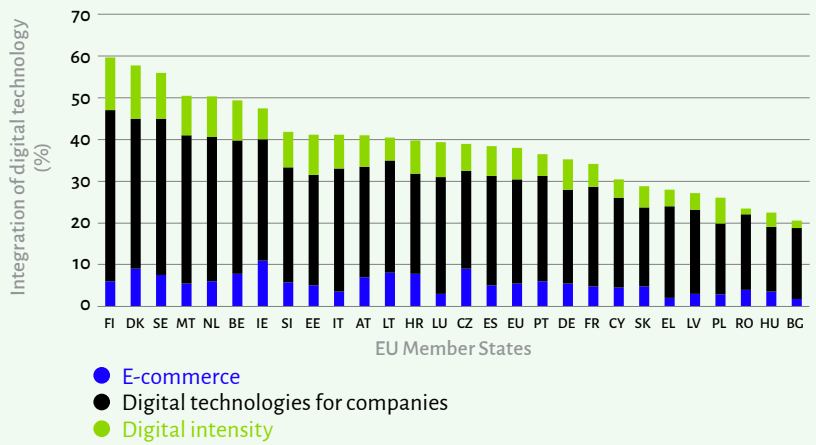
Where are we today?

DESI-INDEX: DIGITAL TECHNOLOGY INTEGRATION

Since 2014, Europe has been monitoring the digital progress of its Member States through the Digital Economy and Society Index (DESI). This index, which brings together various relevant indicators of digital performance, tracks the evolution of EU Member States in four areas: 'human capital', 'connectivity', 'digital technology integration' and 'digital public services'. In this report, we monitor the domain 'integration of digital technology'.

In 2021, Belgium ranked sixth for the level of digital technology integration in its companies. Belgian companies score higher than the European average on several underlying indicators. For example, in 2020, 75% of Belgian SMEs had at least a basic level of digital intensity compared to the European average of only 60%.

DESI 2021 – Integration of digital technology



Source: DESI 2021, European Commission

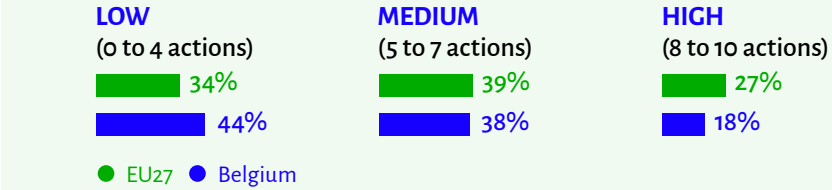
DESI-INDEX: BELGIAN POSITION BASED ON THE SURVEY ON THE CONTRIBUTION OF DIGITAL TECHNOLOGIES TO THE ENVIRONMENTAL SUSTAINABILITY ACTIONS OF EU COMPANIES

Within the framework of the green and digital twin transition, the European Commission wants to monitor the relationship between the implementation of ICT in companies and their environmental attitudes and actions. To this end, a new underlying DESI parameter was developed (within the domain of 'digital technology integration'): ICT for environmental sustainability. This indicator measures the contribution of digital technologies to environmental sustainability actions in companies.

The following ten environmental actions are taken into account: 'use less energy', 'use fewer materials', 'offer products or services virtually', 'facilitate teleworking', 'reduce business travel', 'offer employees sustainable means of transport', 'produce less waste', 'apply eco-design principles', 'reuse equipment or products' and 'measure the environmental impact of the business'. Countries where companies indicate that, on average, ICT contributes to 0 to 4 actions are scored as 'low intensity'. For 5 to 7 actions the score is 'medium intensity' and for 8 to 10 actions 'high intensity'.

Of the Belgian companies participating in the survey, 18% achieved a high intensity (ICT contributes to 8 to 10 environmental actions), which is below the European average of 27%.

DESI 2021 – Contribution of digital technologies to environmental sustainability actions



Source: DESI 2021, European Commission

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Microsoft

Cloud technology as a lever for sustainability

Microsoft wants to help its partners and customers achieve their environmental goals. The weapon it uses for this is technology. “Companies or governments that switch to the cloud can reduce the carbon emissions of their IT applications by 98%. We design our data centres to be as energy efficient as possible and we use green energy as much as possible.”

READ MORE

Audi Brussels

Carbon-neutral factory for electric cars

The Brussels branch of car maker Audi is a pioneer in electric mobility. The factory builds various electric models and has been carbon neutral for several years. By 2025, all Audi sites want to be carbon neutral.

READ MORE

Schneider Electric

“EcoStruxure Platform makes buildings smarter and more flexible”

Schneider Electric offers digital solutions that accelerate the sustainable progress of customers and partners so that they can become more energy efficient, emit less CO_2, and increase safety. The company’s flagship product is the EcoStruxure Platform: it makes buildings smarter and more flexible, and increases safety, efficiency, sustainability and connectivity in a company.

2. Mobile society

Why is this important?

Mobility is essential for businesses and for society. It makes our economic and social world go round. But with the increasing demand for goods and passenger transport, traffic jams have become a growing problem. As well as wasting time, traffic jams have an impact on our well-being, health, safety and work-life balance. They also cause a deterioration in air quality and make an additional contribution to global warming. Time is money: traffic congestion also means additional economic costs for companies.

In this section of the report, we discuss the impact of commuter traffic and service trips on traffic flow. The impact of traffic on the environment and the climate is discussed in Ambition 3: Protect the environment and the planet (p. 59).

Both employers and employees are asking for more sustainable commuting. As an employer, we want to assume our responsibility. By making timetables and working hours more flexible, the morning and evening rush hours are flattened and people are less stuck in traffic jams. We avoid unnecessary travel by working digitally and conferring online more often. Even before the coronavirus pandemic, many service companies in our sector were already teleworking. Since the pandemic, the share of teleworking has further increased; in most companies, the pandemic has accelerated the development of a clear teleworking policy.

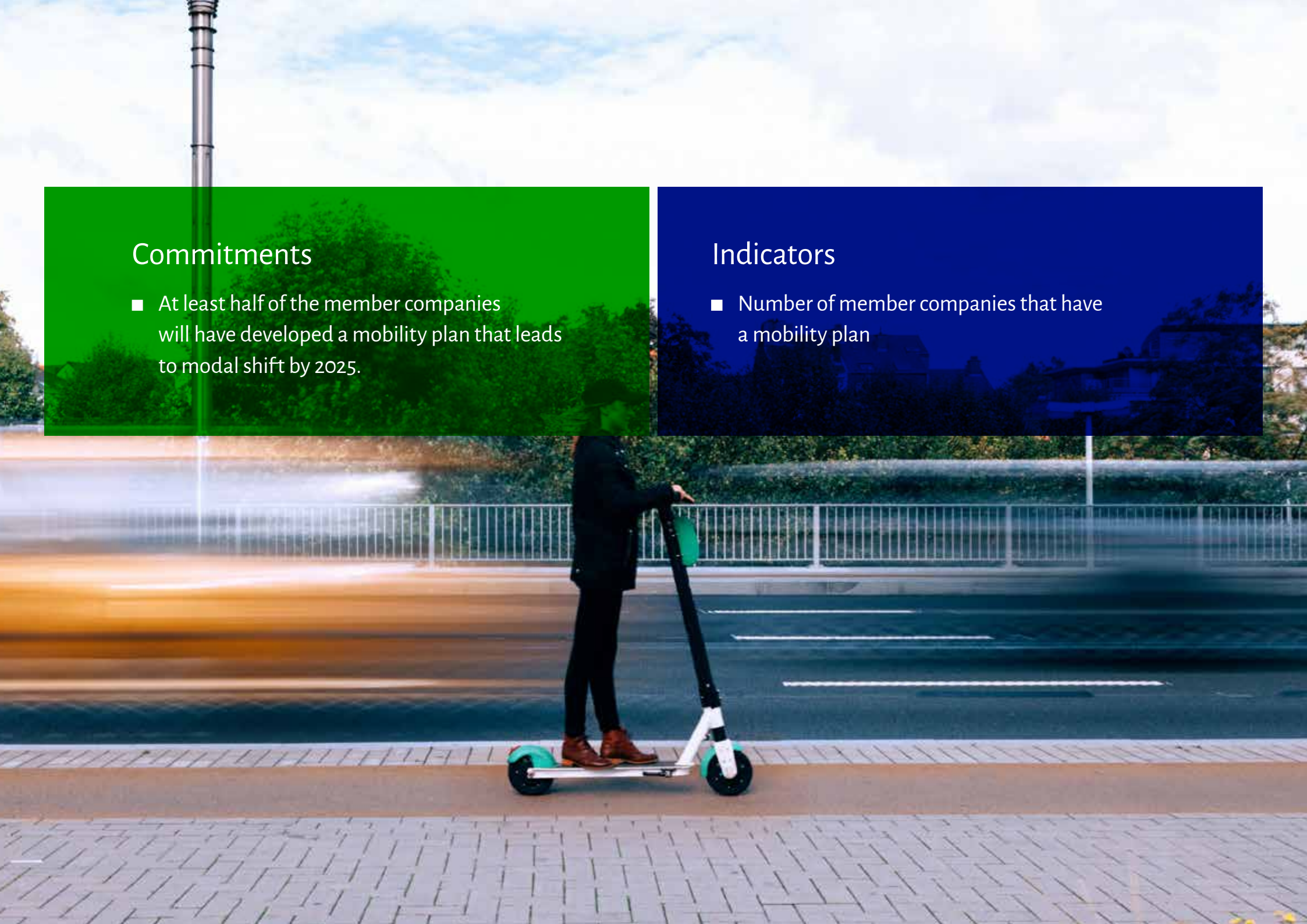
Not every trip can be avoided. That is why we are committed to a modal shift, whereby motorized road transport is replaced as much as possible by other, sustainable means of transport, such as the (electric) bicycle, the train, car sharing and collective transport. All kinds of technological tools, such as multimodal mobility apps, can identify the most suitable transport options (public transport, shared bikes, scooters, cars and steps, etc.). The introduction of a mobility plan in our companies and an adapted policy can help give employees flexibility and incentives to move around more sustainably.

Agoria and the technology industry are strong advocates of intelligent road pricing for cars and vans, as long as it is introduced in a budget-neutral way. Such a levy makes it possible, via a variable traffic tax, to discourage travel during peak hours and thus to spread the traffic better over time. An introduction over the entire territory also offers possibilities to avoid shortcuts and to direct cars to motorways and regional roads sooner. The type of vehicle can also be taken into account: polluting cars then pay a higher tax than more environmentally friendly types. In this way, the measure also becomes an incentive to use vehicles with a lower environmental impact.

Technological solutions for smoother mobility

The technology industry is developing many solutions that help to smooth traffic:

- Belgian manufacturing companies build passenger cars, buses, trucks, trains, trams, bicycles and electric bikes, but also all kinds of parts and components that are used in all kinds of vehicles worldwide.
- Belgian technology companies develop components that are used in intelligent traffic infrastructure or that are needed to implement a smart mileage charge, such as new components for vehicles or systems to exchange data.
- Digital applications that enable teleworking and support flexible working are being marketed by tech companies.
- Software companies are creating digital MaaS platforms that enable people to book train tickets, shared bicycles or cars, for example, according to their needs.
- Dynamic traffic signalling, for example with digital signs are used to direct traffic flows better along different routes. The technology industry is working on intelligent systems to monitor traffic flows and make the best possible use of the available infrastructure. Intelligent traffic lights can also contribute to more sustainable mobility, for example by allowing emergency services and vulnerable road users to pass more smoothly. Studies show that they reduce time loss by 27% at conflict-free intersections and by 44% at other intersections.
- By maximizing vehicle connectivity, we can make better use of our roads. Many vehicles today already have systems that warn drivers when they are getting too close to an object, or that brake automatically to avoid a collision. Our companies are also working on systems that enable autonomous driving or that can detect when a driver is no longer concentrated. In this way, traffic jams and accidents caused by human error are avoided as much as possible.



Commitments

- At least half of the member companies will have developed a mobility plan that leads to modal shift by 2025.

Indicators

- Number of member companies that have a mobility plan

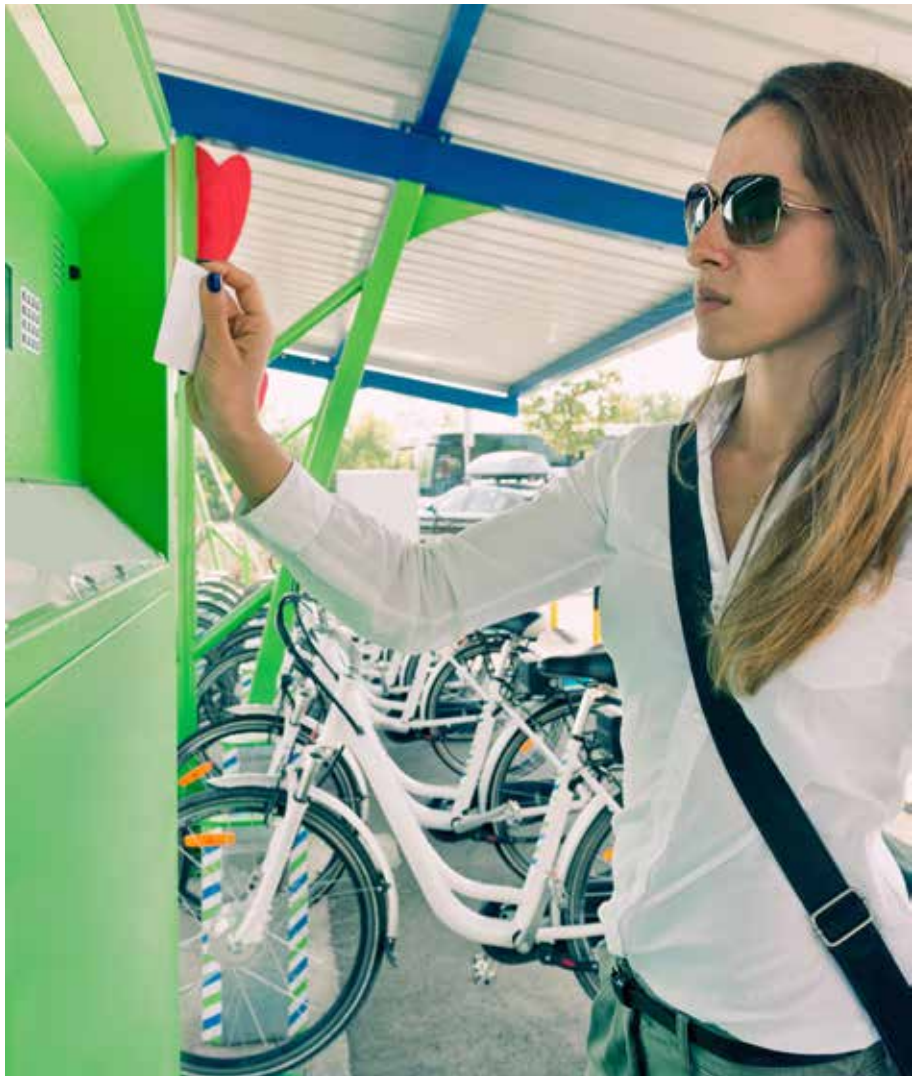
Where are we today?

NUMBER OF MEMBER COMPANIES THAT HAVE A MOBILITY PLAN

From 2022 onwards, we will chart how many member companies have a mobility plan that contributes to the modal shift. Such a mobility plan must contain at least two of the following elements:

- an analysis that shows how employees travel and how the company can be reached by all possible modes of transport
- a teleworking policy depending on the possibilities of the company and the positions available within the company
- an action plan on alternative mobility, in which, for example, incentives are provided for the use of alternative means of transport or in which the use of alternative mobility is facilitated (e.g. the provision of a bicycle parking area, showers, etc.)

We monitor this indicator via a survey of our members.



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Proximus

“The mobility budget is a lever for sustainable travel”

Telecom company Proximus consciously opts for sustainable mobility. More teleworking and a flexible mobility budget play an important role in this. Proximus is also resolutely going for zero-emission cars. The new approach should make it possible, inter alia, to reduce CO_2 emissions drastically: “We want to be using no fossil fuels in our buildings or our fleet of cars by 2030.”

READ MORE

Lab Box

Lab Box develops and promotes innovative mobility solutions for in the city

Lab Box is a young Belgian company that focuses on the future of mobility. It promotes new mobility solutions for liveable cities and supports start-ups in the practical development of alternative mobility concepts. “The time is ripe for change”, says Managing Director Michaël Grandfils.

3. Data economy

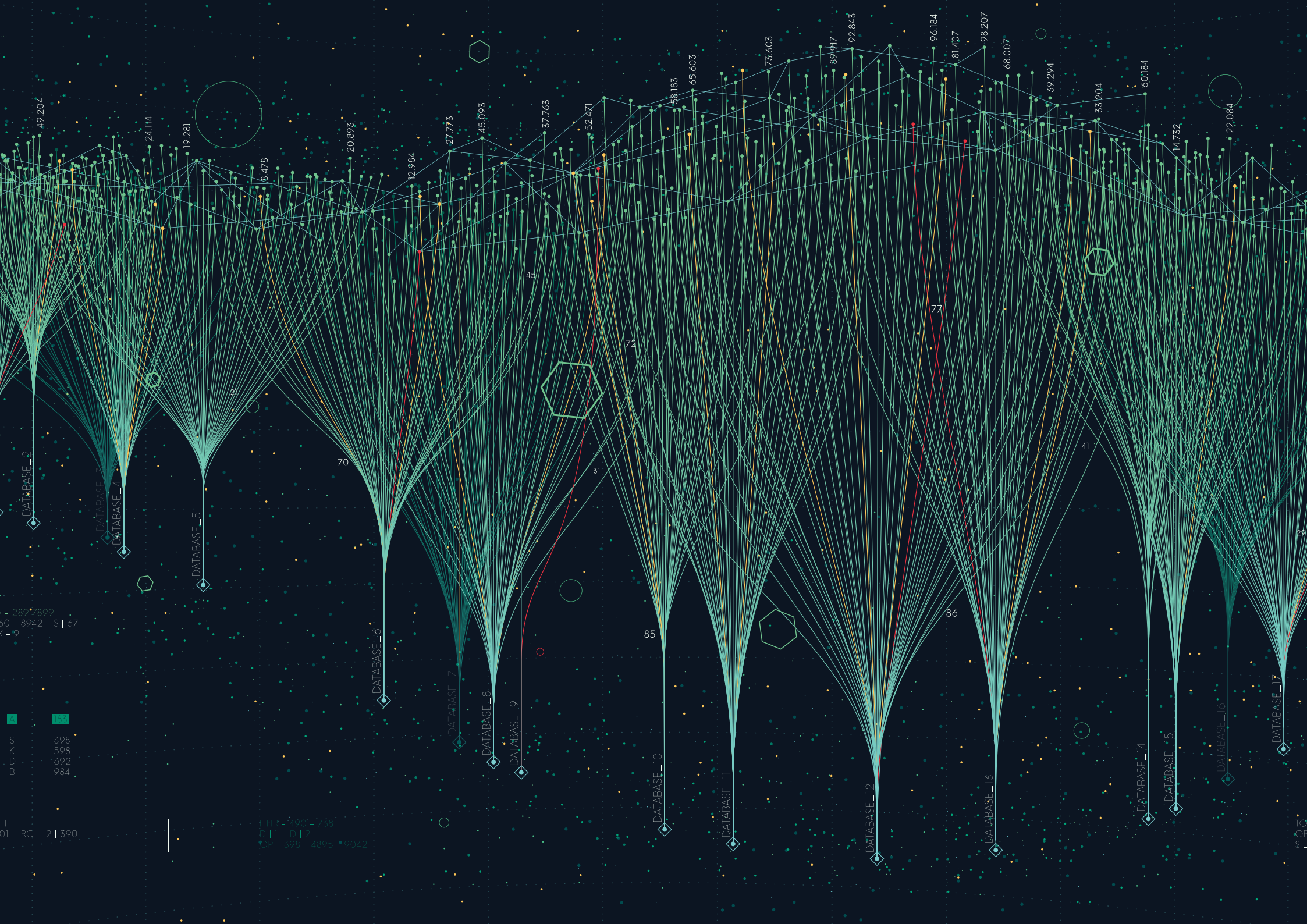
Why is this important?

Companies and private individuals alike are increasingly connected to the Internet. As a result, we are all generating a huge amount of data, which is doubling every two years. Currently, data are valuable mainly to big players such as Google or Facebook, who use them for commercial applications. By evolving from a data economy to a data sharing economy, in which companies and governments share their data with others, an enormous potential for innovation is created.

The idea is that consumers and companies that generate data through a device, whether mobile phone, a car or a device that connects to other devices via the Internet of Things, should have free access to said generated data. This data sharing economy offers the technology industry a range of new opportunities that we want to exploit to the full. If companies - including smaller companies and start-ups – gain access to large amounts of data, they can implement innovations with a high social added value. For instance, if all European hospitals shared their data sets, companies could create much more accurate algorithms to detect e.g. COVID-19 on an X-ray using AI.

The free flow of data needed to do this still faces many hurdles at present. For example, there is a lack of open data from government organizations such as transport companies. To enable data-driven innovations, the EU is working towards a single market by 2030, where data from governments, businesses and individuals are used smoothly, safely and correctly for the public good.

From the technology industry, we are, for example, a partner in the international cooperation project Gaia-X, in which business, science and government work together on the data infrastructure of the future. The goal: an open, transparent and secure digital ecosystem in which data and services can be made available, collected and shared. We are also working on the European Data Spaces for sectors such as environment, energy and agriculture. With these data spaces, the EU wants to make better use of public data for research for the public good, support the exchange of data by individuals and create structures for key organizations to exchange data.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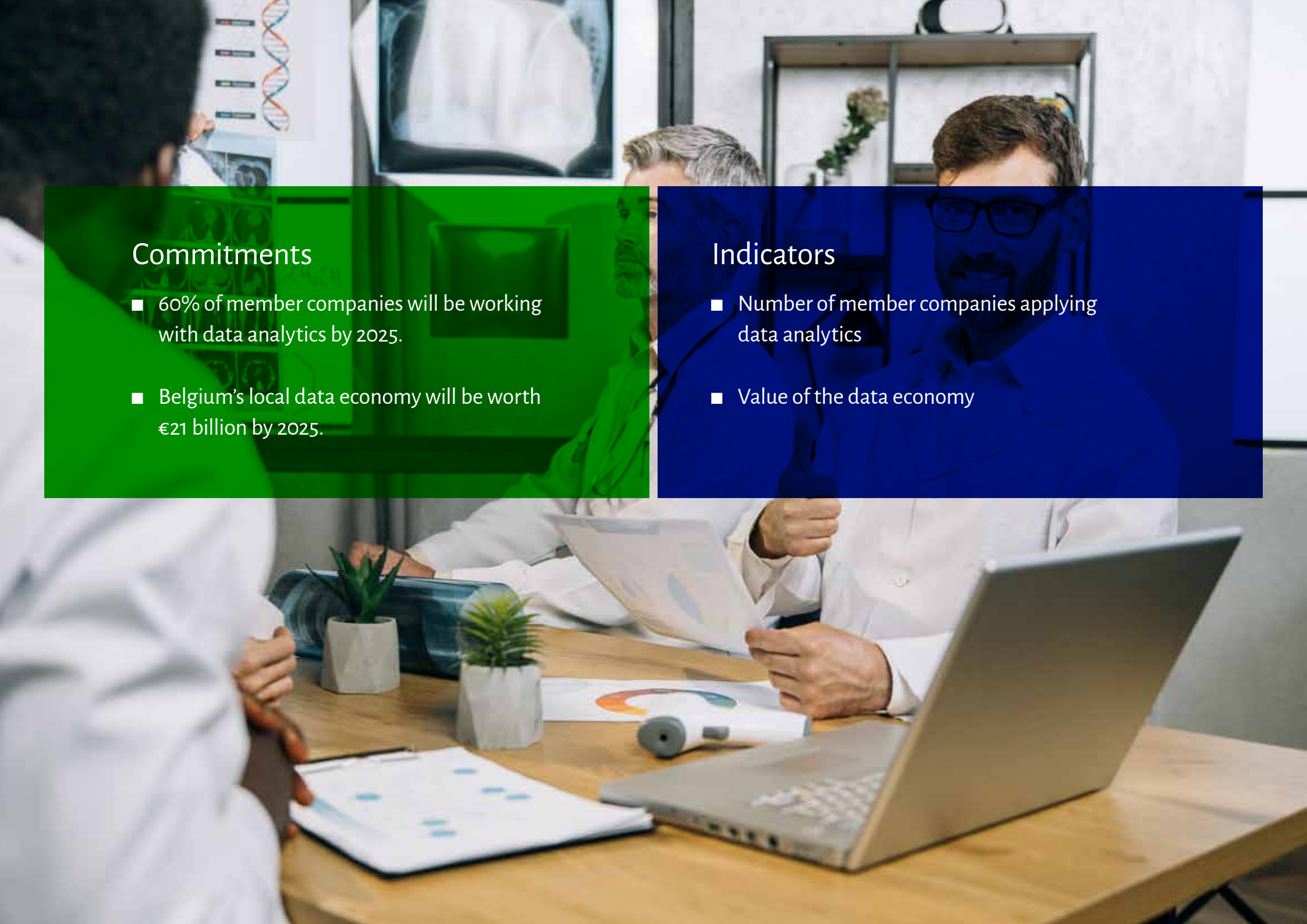
Technological developments for a streamlined data economy

We in the technology industry want to help unlock the potential of the data sharing economy to create more value in this economy:

- Technology applications from our sector enable companies and governments to use data on an unprecedented scale so as to improve and develop their operations. Instances include the use of data to train AI algorithms, but also of the huge increase in Internet of Things applications. Data are at the heart of making all these innovations possible.
- Data software developed by the technology industry lead to optimizations and cost savings in just about every industry. Innovative data applications and software, for example, enable a better understanding of industrial processes, better adjustment of installations to production requirements and the targeted detection of defects in process installations. Industrial installations can be preventively screened and repaired by collecting and properly managing data. This results in a longer life span of an installation.
- Many Belgian companies, including in the manufacturing industry, are working on data-related business models. They currently use their data mainly internally to improve their own products and services. Companies can also share that data externally, provided they have a usable revenue model. Suppliers of heat pumps, such as Daikin, for example, can share their temperature measurements and thus contribute to a detailed heat map of Belgium.
- A technological development with a great deal of potential is the digital twin, a virtual representation of a physical object or environment. Data from different sources are needed to create a digital twin. Currently, two or three sources are often sufficient, because digital twins are only created to solve very specific problems, for example to see what shadows a building will cast. In an extended data economy, it will be possible to create much better digital twins, which will offer many more possibilities.
- Privacy and data protection are thus an integral part of today's business. And their importance will only increase. In this area, too, the digital industry facilitates companies: we provide technological solutions to protect data better. We are also working on applications to facilitate the free movement of personal data within the EU and the transfer to third countries.



Commitments

- 60% of member companies will be working with data analytics by 2025.
- Belgium's local data economy will be worth €21 billion by 2025.

Indicators

- Number of member companies applying data analytics
- Value of the data economy

Where are we today?

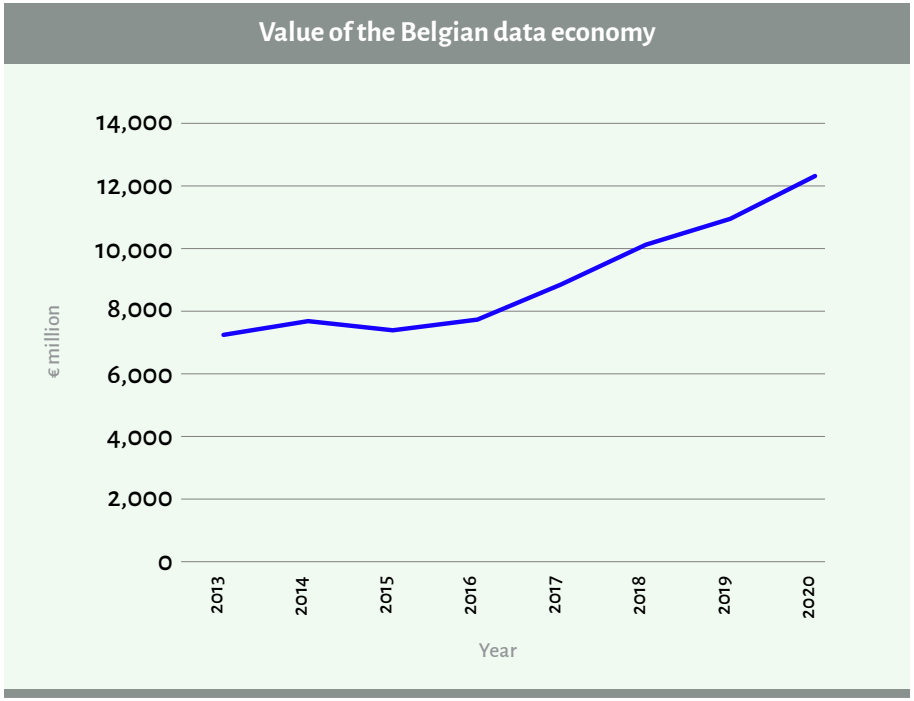
NUMBER OF MEMBER COMPANIES APPLYING DATA ANALYTICS

In 2019, 40% of our members applied data-analytics (source: Agoria white paper Digital is a mindset). By data-analytics, we mean the effort to give meaning to raw data with the help of specialized computer systems. These systems transform, organize and model data to draw conclusions and identify patterns.

We will monitor this indicator from 2022 onwards through a survey of our members.

VALUE OF THE DATA ECONOMY

Belgium's data market value has been growing steadily in recent years. In 2021, the value of the local data economy amounted to almost €14 billion, accounting for 3.3% of GDP and some 130,000 jobs (source: European Data Market Monitoring Tool, International Data Corporation (IDC) 2020).



Source: European Data Market Monitoring Tool, International Data Corporation (IDC) 2020

READ MORE

GIM

“Location information helps customers make sustainable choices”

At GIM, more than 70 geo-experts help governments, businesses, research institutions and NGOs to better understand the world. Their flagship product is the digital twin ‘Belmap’: a virtual representation of the built environment with detailed information on all buildings, addresses and related topics. The digital twin enables GIM’s customers to make sustainable decisions about climate, energy, urban development and mobility.

READ MORE

Fibricheck

Preventing strokes with an app

Fibricheck enables anyone to monitor his or her own heart rhythm and thus detect heart rhythm disorders. The company is also using the expertise and software behind the application to accelerate the development of other digital applications for healthcare. Prevention, remote patient monitoring and a reduction in the burden of care are the key words here.

AMBITION 3

Protect the environment and the planet

Climate change is emerging as one of the greatest challenges of this and future generations. Other environmental problems, such as air and water pollution and the depletion of natural resources, are also putting pressure on the planet. By reducing our own emissions and using fewer primary raw materials, we want to further reduce the impact of the technology industry on the environment. The innovative technologies developed by our sector help other companies and the rest of society to protect our planet and accelerate the climate transition.

1. Climate action

Why is this important?

The technology industry is responsible for 3.1% of Belgium's greenhouse gas emissions. The share of the technology industry in the total emissions of Belgian industry is 4%. As a technology industry, we want to take our responsibility by not only reducing our direct greenhouse gas emissions, but also by tackling the indirect emissions in the entire value chain of our products and services.

Europe wants to be the first climate-neutral continent in the world by 2050 and has launched the Green Deal to this end. With the 'Fit for 55' package of measures, Europe aims to reduce its greenhouse gas emissions by 55% by 2030. The technology industry supports the Green Deal and Fit for 55. In order to achieve the European climate targets, the current reduction in greenhouse gas emissions in our sector must be accelerated. This concerns industrial emissions, emissions from our buildings and transport emissions.

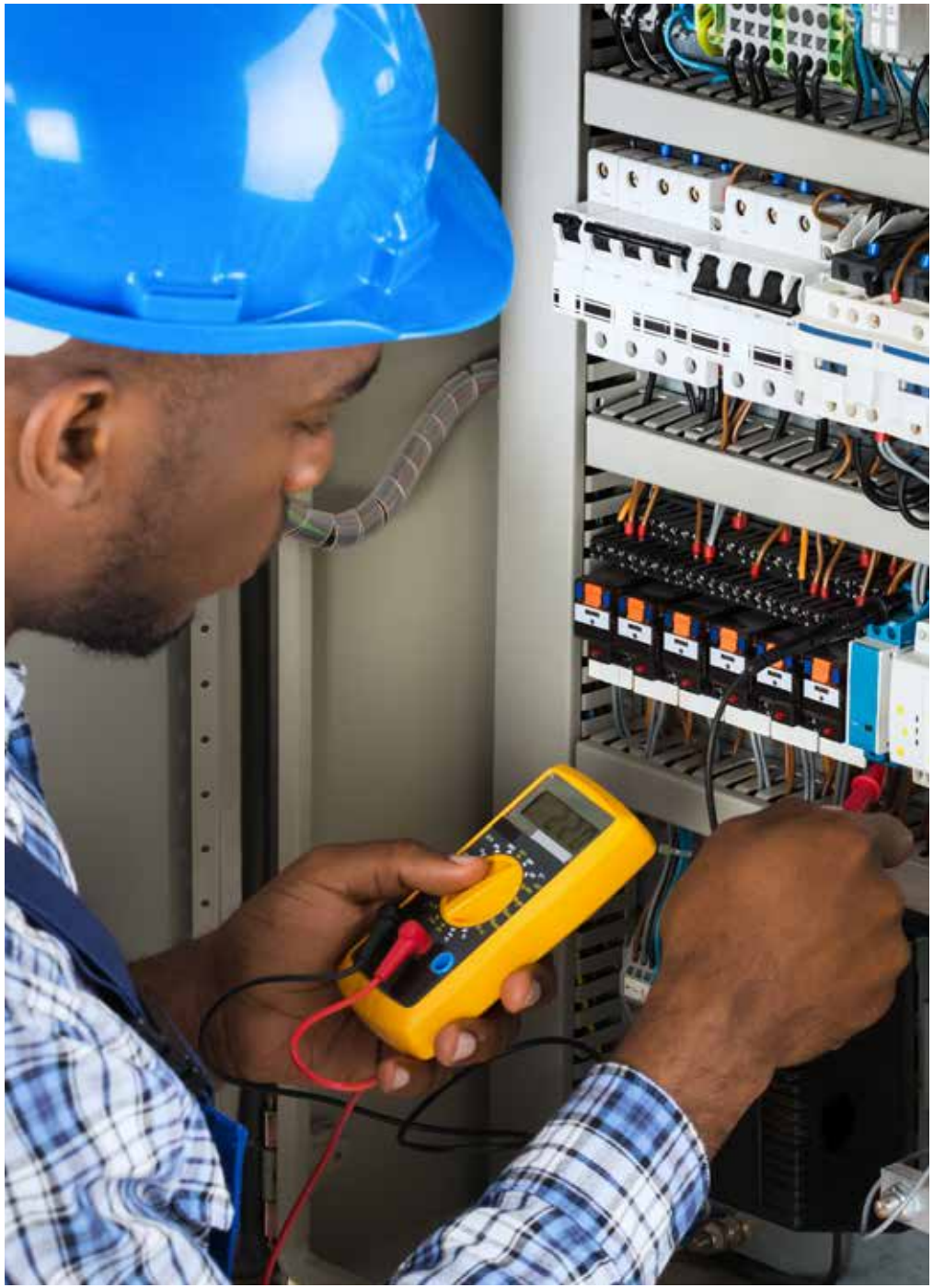
The green transition is closely linked to the digital transition (twin-transition). Digital technology is helping us to reduce our footprint, for example by replacing business trips with video meetings, by monitoring how much energy our buildings use or by using drones for smart farming. At the same time, we must ensure that digital technology does not consume more energy than it saves. According to European Commission figures, digital technology accounts for 8-10% of energy production and 2-4% of greenhouse gas emissions in Europe. Innovations can help reduce that footprint, for example by extending the life of smartphones or by switching from 4G to 5G. The EU wants to introduce new legislation and measures to achieve its green and digital ambitions over the next decade. For example, Europe wants data centres to be climate neutral, energy efficient and sustainable by 2030 at the latest.

With the Taxonomy Regulation, Europe wants to ensure that the resources of governments and investors flow as much as possible to sustainable technologies. From Agoria we guide our members actively to implement this new policy and also to benefit from new green subsidy possibilities and investment programmes that focus on sustainable innovation.

Technology as a lever for the climate transition

To facilitate the climate transition, the technology industry offers a wealth of solutions:

- The manufacturing industry develops and manufactures numerous components for generating renewable energy. Just think of hydrogen generators, biogas plants, solar panels and components for mega wind farms at sea.
- Climate-neutral construction is only possible thanks to innovative building technologies, LED lighting, solar panels, heat pumps, cogeneration, heat networks, green heat, the digital meter, and so on.
- Our sector is at the heart of the transport transition: manufacture of electric vehicles, charging infrastructure, battery technology …



Commitments

- We subscribe to the European reduction target of Fit for 55.
- Through our products and services we reduce the climate impact of other sectors. For example, we help ensure that 30% of the buildings are climate neutral by 2030.
- By 2025, every new commercial vehicle in the technology industry (excluding heavy transport) will be powered by zero-emission technology.

Indicators

- Total energy consumption and energy intensity
- Share of renewable energy in the total energy supply of the technology industry
- CO_2-eq emissions of the technological industry (scope 1 and 2)
- Percentage of climate-neutral buildings in Belgium
- Percentage of company fleet powered by zero-emission technology (excluding heavy transport)

Where are we today?

TOTAL ENERGY CONSUMPTION AND ENERGY INTENSITY

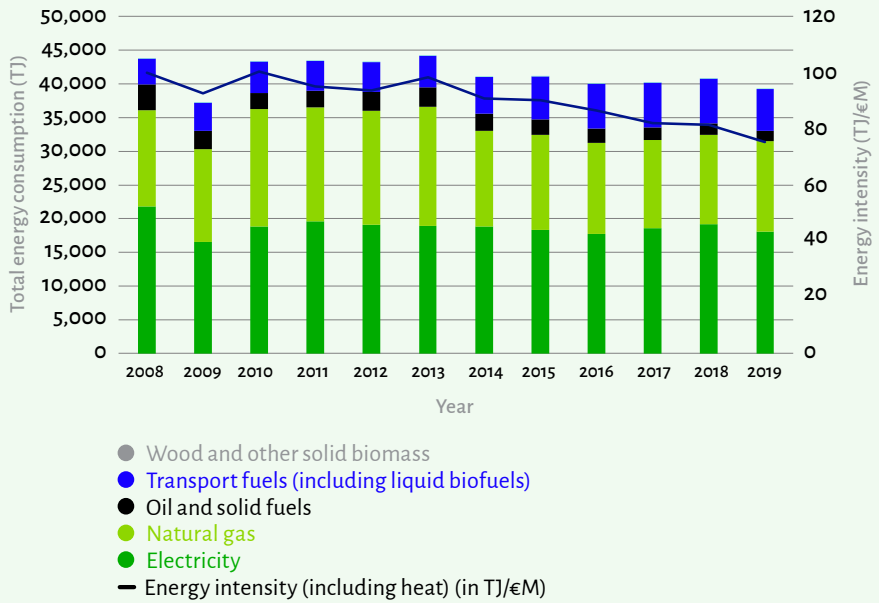
The total energy consumption of the technology sector decreased by an average of 1.1% each year in the period 2008-2019. In the same period, the added value of the technology industry grew by 16%. As a result, energy intensity (energy consumption per unit of added value) decreased on average by 2.4% per year. We can deduce from this that economic growth in the technology industry has been decoupled from energy consumption over the past decade: the growth of our sector did not lead to increased energy consumption.

For Belgium, the Fit for 55 targets are a 0.9% annual reduction in final energy consumption (period until 2030) and a 1.5% annual reduction in energy intensity. If we take the current trend in the technology industry into account, the total energy consumption and energy intensity of the technology industry are thus in line with Fit for 55.

Natural gas consumption per unit of product decreased by 20% in the period 2008-2019; electricity consumption decreased by 29%. On the other hand, the consumption of transport fuels increased by 38.5% in the same period, which is mainly due to the consumption of payroll vehicles in our sector. Due to the disappearance of the tax benefit for non-electric payroll cars, companies will review their car policy in the coming years and propose alternatives to the payroll car to their employees. We therefore expect that the consumption of transport fuels in our sector will decrease significantly in the coming years. We can also further increase our energy efficiency by renovating our buildings more and more.

The energy consumption of the digital industry has not yet been fully mapped out. The ongoing study within the framework of Digital4Climate will try to provide an answer to this. In that study, we examine the net impact of digital technologies on Belgium's carbon footprint. This study will also take into account the reduction of the footprint of, for example, the construction sector thanks to digital innovations (such as the heat pump and the smart thermostat).

Total energy consumption and energy intensity in the technology industry; 2008 = 100



Sources: Physical energy flow accounts (Bureau du Plan [Planning Office]); energy consumption statistics (Statbel); Belgian greenhouse gas inventory, CRF tables (Eionet Central Data Repository); VITO [Flemish Institute for Technological Research] data; Agoria calculations

CO_2-EQ EMISSIONS FROM THE TECHNOLOGY INDUSTRY (SCOPE 1 AND 2)

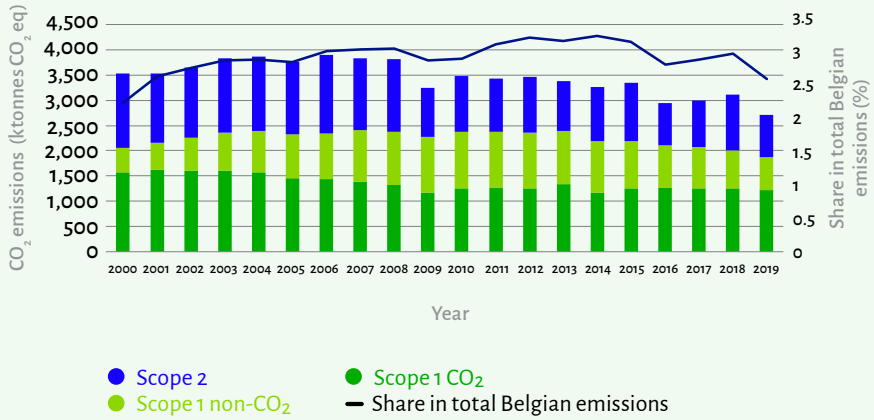
The greenhouse gas emissions of the technological industry have decreased by 23% since 2000. This decrease occurred mainly after 2008. Until then, the decline in CO_2 emissions was compensated by an increase in non-CO_2 emissions, mainly fluorinated greenhouse gases (F-gases*).

Since 2010, we have seen a turnaround in non-CO_2 emissions, as a result of the policy on F-gases, in which Agoria actively participates. For example, our sector is actively working on better maintenance and better capture of gases during the dismantling of cooling installations, and on the use of coolants with a lower Global Warming Potential (GWP). As a result of these interventions, the share of greenhouse gas emissions from the technology industry in Belgium's total emissions has been decreasing again since 2012.

Total greenhouse gas emissions in our sector have fallen by an average of 1.8% annually in recent years. The Fit for 55 targets call for Belgian emissions to decrease by an average of 3% each year. The decrease in CO_2 emissions currently observed must therefore accelerate, including in the technology industry. Our sector still has some way to go to become fully climate neutral by 2050.

By switching on a larger scale to renewable energy and systematically tackling the greenhouse gas emissions of our products and services from design to use, we are taking up this challenge. In addition, we want to bring technological solutions that contribute to climate neutrality to the market on a large scale. Through R&D, we also develop new innovations that further support and accelerate the transition.

CO_2 emissions from the technology industry



Sources: Belgian inventory of greenhouse gases, CRF tables (Eionet Central Data Repository); Agoria calculations

* F-gases are used in refrigeration equipment, air-conditioning units and heat pumps, and account for a large proportion of total greenhouse gas emissions. They are allocated to the producer of the equipment in the emission calculations, regardless of where they are released. F-gases often only enter the atmosphere in the usage phase.

SHARE OF RENEWABLE ENERGY IN TOTAL ENERGY SUPPLY OF THE TECHNOLOGY INDUSTRY

17% of our companies are located in buildings with solar panels. We want to map the size of those solar panels and their output by 2022.

Fit for 55 aims to double the share of renewable energy in Europe by 2030. Belgium can achieve this doubling if the current plans of the Belgian authorities are realised. Companies in the technology industry contribute to this by producing renewable energy themselves (e.g. via solar panels), by purchasing green energy via power purchase agreements (PPAs) and by applying certification systems (green certificates and guarantees of origin). Our sector also makes an important contribution to the shift to renewable energy through the development and manufacture of renewable energy systems, such as off-shore wind turbines, turbine components and heat pumps.

PERCENTAGE OF CLIMATE-NEUTRAL BUILDINGS IN BELGIUM

In 2021, the share of climate-neutral buildings in Belgium was 4%.

From 2022 onwards, this indicator will be monitored further via the residential EPB/EPC.

PERCENTAGE OF COMPANY FLEET POWERED BY ZERO-EMISSION TECHNOLOGY (EXCLUSIVE OF HEAVY TRANSPORT).

We will monitor this indicator from 2022 onwards.

READ MORE

Encon

“We help companies to grow sustainably”

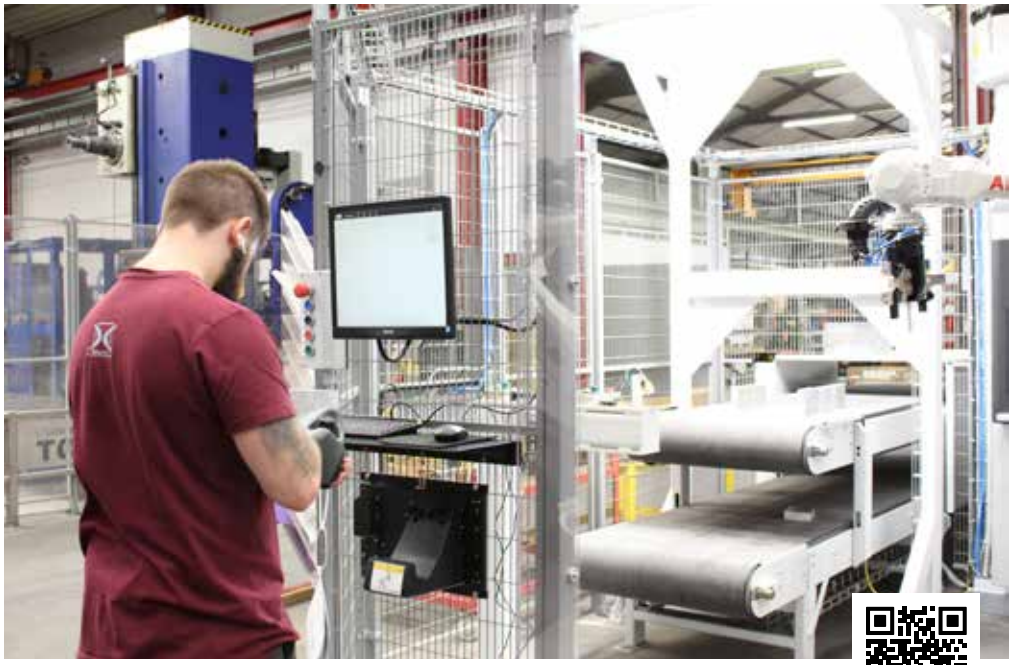
Consultancy firm Encon supports companies with innovative solutions in their transition to greater sustainability. Encon’s showpiece is its own sustainable Infinity office building: “By setting a good example, we can more easily persuade other companies.”

READ MORE

Daikin

Sustainable heat from Daikin

When it comes to sustainable heating, heat pumps are at the top of the list. Backed by initiatives such as the Green Deal, the technology is ready for further growth. Daikin is therefore investing in the further development of the heat pump with a new research centre in Ghent. “Our estimate is that by 2030, four million heat pumps will be installed annually in Europe.”



READ MORE

D. Cloostermans-Huwaert N.V.

Machine builder Cloostermans greening business operations and products

D. Cloostermans-Huwaert NV designs and builds custom-made industrial machines. In recent years, the company invested in 100% green electricity, among other things by installing 1500 solar panels. In addition, they are working on energy efficiency by installing low-cost LED lighting, insulating their buildings and electrifying their fleet of vehicles. Energy saving options in the machines they build also help their customers to be more energy efficient.

READ MORE

Volvo Trucks Ghent

From CO_2 neutral to CO_2 positive

The site of Volvo Trucks in Ghent has been CO_2 neutral since 2007. However, the energy demand will increase significantly over the next few years, partly because the factory will be assembling battery packs for all the European Volvo sites. Volvo Trucks anticipates this with a plan that will make the site CO_2 positive.

2. Circular economy

Why is this important?

The linear economy – extract, produce, consume and dispose – is not sustainable for the planet. It contributes to climate change and exerts high pressure on the environment and biodiversity. The circular economy promotes a more sustainable model of production and consumption in which raw materials are kept longer in production cycles and are used repeatedly, thus creating less waste. According to OECD figures, more than half of greenhouse gas emissions are due to the use of raw materials and materials, so the circular economy also helps to achieve climate ambitions.

The circular economy is about extending the life span of products: by reusing them, by recycling the materials from end-of-life products to the highest possible quality and reusing them in production processes and by designing products in such a way that they can be upgraded, repaired and recycled. New business models mean that products are no longer sold directly to the customer, but are leased and taken back after use. The circular economy is one of the biggest game changers for the industry today.

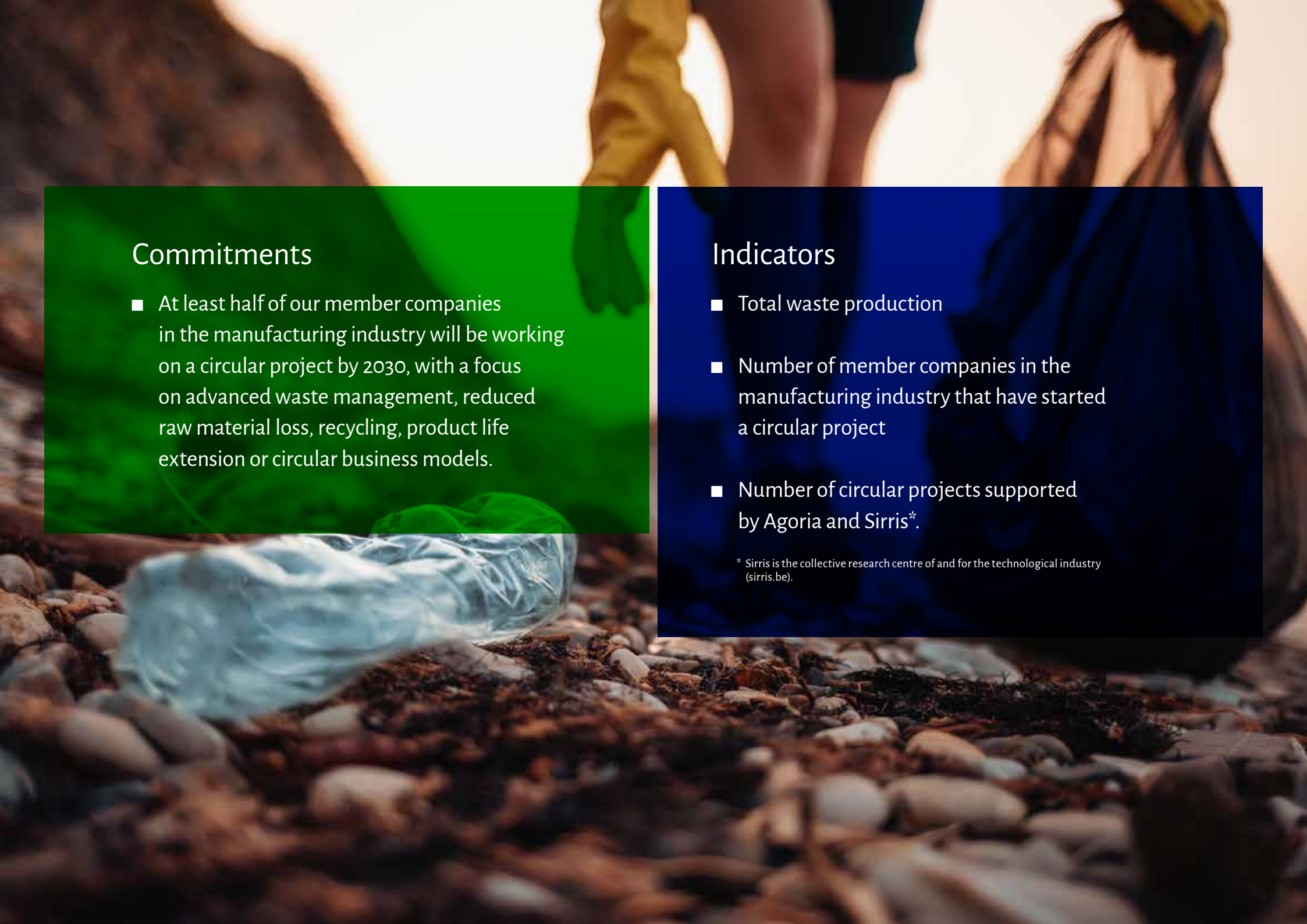
New circular business models generate innovation and create numerous jobs throughout the value chain. The switch to a circular model also helps companies to work more cost-efficiently and to increase their competitiveness. In view of rising prices for raw materials, the thrifty use of raw materials is becoming even more important for companies. And the circular economy also offers strategic advantages. For example, Europe and Belgium are highly dependent on other regions for their supplies of critical materials. Moreover, the coronavirus pandemic has painfully exposed the vulnerability of international supply chains. With the Circular Economy Action Plan, part of the Green Deal, Europe wants to scale up the circular economy and thus create new jobs and guarantee competitiveness in the long term. By focusing on circularity, Europe wants to enable the economy to grow further without increasing the consumption of raw materials.

The transition to a more circular economy requires cooperation between all the links in the production chain: from the design phase to the moment a product is discarded. This transition to a sustainable ecosystem of smart chains can only be a success if our manufacturing companies extensively digitise, implement new technologies and redesign and adapt industrial processes.

Technological building blocks for the circular economy

The circular economy constitutes a challenge for the manufacturing industry. At the same time, the technological industry provides the necessary building blocks for that same circular economy:

- Household waste, industrial residues, construction waste ...: waste recycling companies upgrade waste to new raw materials or extract energy from it. With innovative recycling techniques, for example, they help to recycle plastics and prevent plastic waste.
- Belgian material technology companies extract valuable materials from mobile phones and laptops through recycling. They recycle them into materials for high-quality components, such as solar cells, rechargeable batteries, LED applications and catalysts.
- Digital technology is needed to map the location, use, loss, availability and status of materials in the production chain. Data analysis supports circular design, the remanufacturing of products or components, or the creation of product-service combinations.
- Technologies such as block chain help to attain interoperability between companies in the chain, so that information can be transferred securely and transactions with partners up and down the business ecosystem are possible.
- Sensors help to determine when industrial components or utensils need to be replaced. Intelligent and connected products can indicate themselves whether and when maintenance and repair are required. For example, the car of the future is full of sensors that provide the manufacturer with real-time information on the condition of each component. Parts can be replaced on demand, which extends the life of the product.
- With 3D printing, parts can be printed on demand, so the whole device is not discarded.



Commitments

- At least half of our member companies in the manufacturing industry will be working on a circular project by 2030, with a focus on advanced waste management, reduced raw material loss, recycling, product life extension or circular business models.

Indicators

- Total waste production
- Number of member companies in the manufacturing industry that have started a circular project
- Number of circular projects supported by Agoria and Sirris*.

* Sirris is the collective research centre of and for the technological industry (sirris.be).

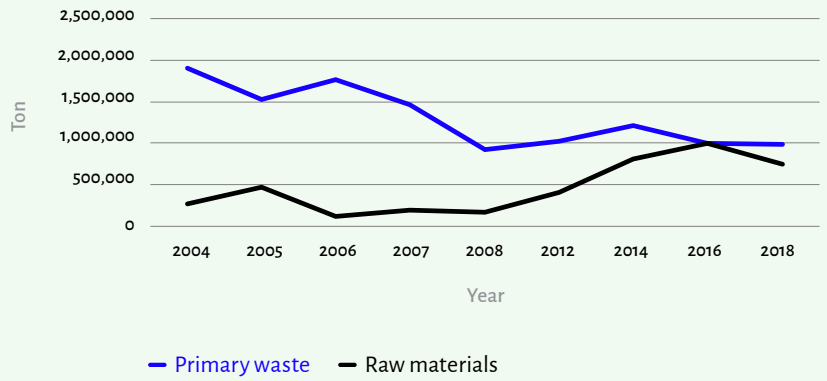
Where are we today?

TOTAL WASTE PRODUCTION

In 2018, the total waste production of Belgian households and economic activities amounted to just over 67 million tonnes. Industrial activities – excluding services and construction – accounted for just over 50% of total waste generation.

About two-thirds of Belgian industrial waste is generated by Flemish companies. The total amount of generated waste has slightly increased in recent years. This slow increase is counterbalanced by a significant decrease in waste generation by the technology industry. Compared to 2004, the amount of primary waste generated by the technology industry has fallen by about half. In 2018, the manufacturing industry accounted for 60% of primary waste generation in the technology industry, the environmental and energy-intensive industry for about 39% and the digital industry for 1%.

Development of primary waste and raw materials for the technology industry



Source: Waste and raw material generation data - OVAM Integral annual environmental report. The figures pertain only to companies in the technology industry in Flanders. Note: no figures for the manufacturing industry are available for 2016 and 2018. Note: the graph reflects only a trend, as the reported figures are not complete.

NUMBER OF MEMBER COMPANIES IN THE MANUFACTURING INDUSTRY WORKING ON A CIRCULAR PROJECT

The survey of our members shows that 47% of the respondents apply circular principles in their business operations. Taking circularity into account in the design of the products, recycling, reverse logistics and digital technologies are the most common.

Number of companies implementing a given circular strategy (2020)

Source: Survey of Agoria members (2020)

From the next report onwards, we will be tracking how many member companies in the manufacturing industry are working on a circular project. This can involve:

- the optimization of materials management (advanced waste management, less loss of raw materials during production and offering functionality with less raw materials, rethink)
- recycling (of own waste materials, use of recyclate), life extension of products (repair, reuse, remanufacturing)
- circular business models (product as a service, sharing platforms, etc.)
- enablers such as circular design, reverse-logistics systems or the use of digital technologies in function of circular strategies

NUMBER OF CIRCULAR PROJECTS SUPPORTED BY AGORIA AND SIRRIS

We will monitor this indicator from 2022 onwards through a survey of our members. We look at both learning networks and individual support projects.

READ MORE

ETAP Lighting

“We are increasingly offering lightning as a service”

For 70 years, ETAP Lighting has been focusing on energy-efficient, long-life lighting solutions. The company is now taking its commitment to sustainability to the next level by also offering lighting as a service: “We install long-lasting luminaires, maintain them and take them back for re-use or recycling after their lifetime. The service model encourages us to become even more sustainable.”

READ MORE

Aisin Europe

Aisin gives discarded gearboxes a new lease of life

Known until recently as AW Europe, Aisin Europe is a global manufacturer of original and second-hand car parts. The company is a market leader in the production of automatic gearboxes. The Belgian branch of Aisin specialises in reusing transmission elements: “Our remanufactured gearboxes meet the same quality requirements as ‘original equipment’, at a fraction of the price.”

READ MORE

Atlas Copco

The AIRplan of Atlas Copco: a service contract to supply compressed air

An energy-efficient compressed air system is a major investment. What's more, demand can increase or decrease with changes in a production process. That's why compressor specialist Atlas Copco offers compressed air as a service: "Our AIRplan is flexible and always seeks the most energy-efficient solution tailored to the customer's needs. That's better for the company and for the climate."

READ MORE

Campine

Campine recovers chemicals from plastics

Canvases for stadiums, car dashboards, insulation material, electric chargers... To make all these products less flammable, antimony trioxide is added. Recycling company Campine refines antimony from industrial waste and processes the recovered metal into flame retardant solutions. "Reusing raw materials is better for the planet and for our business model."

3. Protection of the environment

Why is this important?

With the Zero Pollution Action Plan, part of the Green Deal, the European Commission wants to reduce the pollution of air, water and soil by 2050 to a level that no longer harms the health of people and the environment. For years, our companies have been taking action to significantly reduce their emissions into the environment. We are committed to further reducing our direct environmental emissions and also to identifying and addressing our indirect environmental impacts in the chain (both upstream and downstream).

Water

Belgium ranks sixth among OECD countries with the highest water stress. We therefore have to use water efficiently in our country. At the same time, water is an essential raw material for many industrial processes. About a quarter of the total water consumption in Belgium is accounted for by industry; a little over half is used for industrial cooling. If we leave cooling water out of consideration, the technological industry only contributes 5.6% of the total water consumption. Nevertheless, we want to further reduce our water consumption.

Our companies have also made considerable efforts in recent years to reduce their emissions to surface water. For example, the waste load of metals has been greatly reduced. We take our responsibility to reduce our water emissions even further.

Air

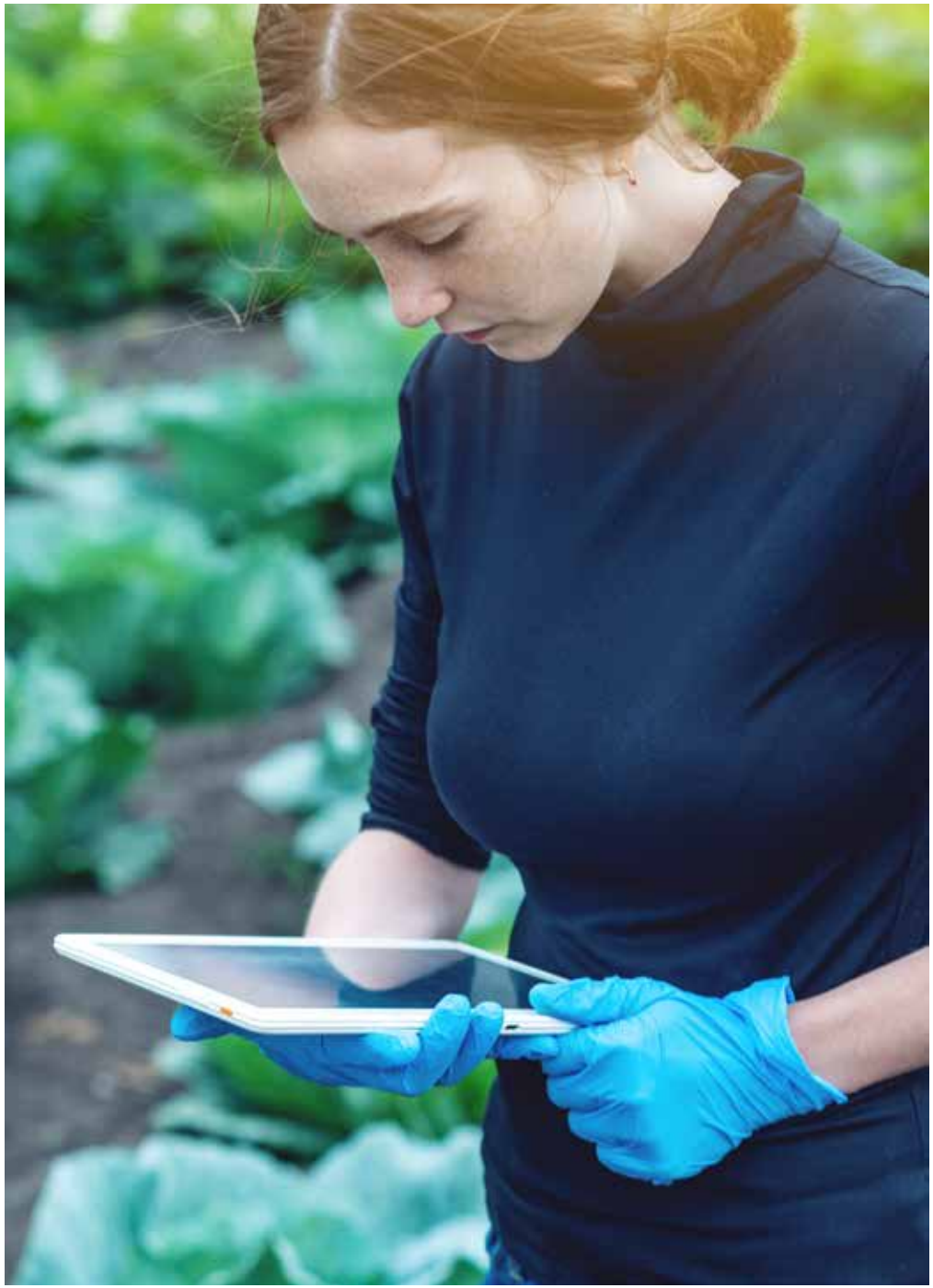
In the EU, more than 400,000 premature deaths are caused by air pollution every year (source: European Environment Agency). Europe wants to reduce this number by 52% by 2030 compared to 2005, by bringing air quality standards closer to those recommended by the World Health Organisation (WHO). It also wants to reduce the area of ecosystems where eutrophication limits are exceeded by 35% compared to 2005. Our members have already made strong commitments to reducing their air emissions in recent years. We are committed to further reducing our air emissions.

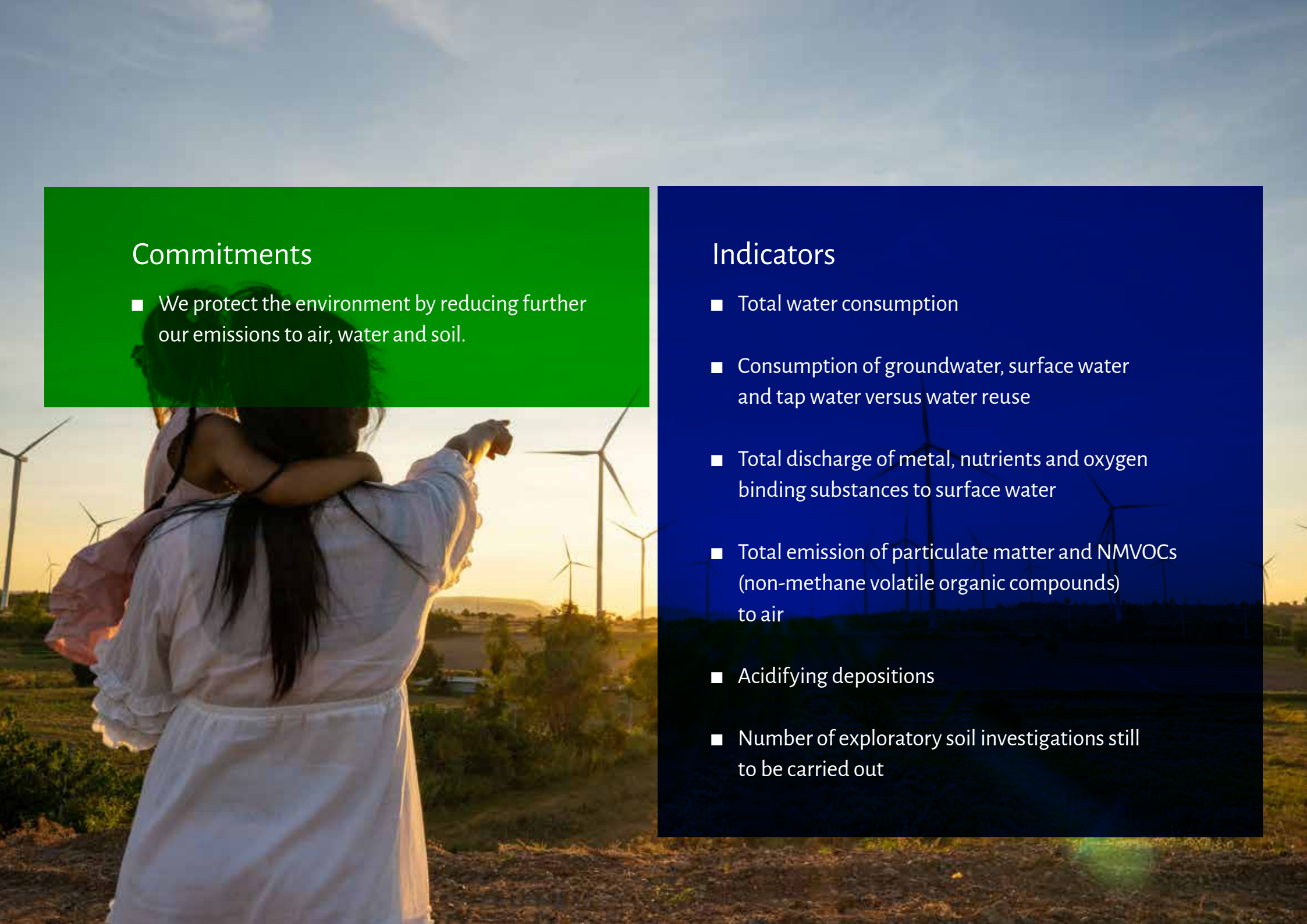
Soil

Soil is a key provider of ecosystem services such as food production, groundwater purification, water retention to reduce flooding, carbon sequestration and so on. Yet some 60-70% of soils in the EU are not healthy (source: European Commission). Industrial pollution is one of the causes; in Belgium it is mainly historical pollution. Preventive measures ensure that new soil pollution, as a result of calamities, remains minimal. Our members meet their obligations to carry out soil surveys and soil decontamination where necessary.

Digital technology helps with environmental monitoring

Digital and other technologies is helping to reduce the environmental impact of our own sector and that of other sectors and companies. For example, the Internet of Things makes it possible to use sensor, data and network technology to monitor water and air quality in real time. Technology also creates many opportunities to monitor and reduce the risk of floods and droughts, e.g. AI used to predict the flooding of watercourses quickly and accurately. Data management and data analytics are used to capture, analyse and connect large amounts of measurements to make environment-related decisions.





Commitments

- We protect the environment by reducing further our emissions to air, water and soil.

Indicators

- Total water consumption
- Consumption of groundwater, surface water and tap water versus water reuse
- Total discharge of metal, nutrients and oxygen binding substances to surface water
- Total emission of particulate matter and NMVOCs (non-methane volatile organic compounds) to air
- Acidifying depositions
- Number of exploratory soil investigations still to be carried out

Where are we today?

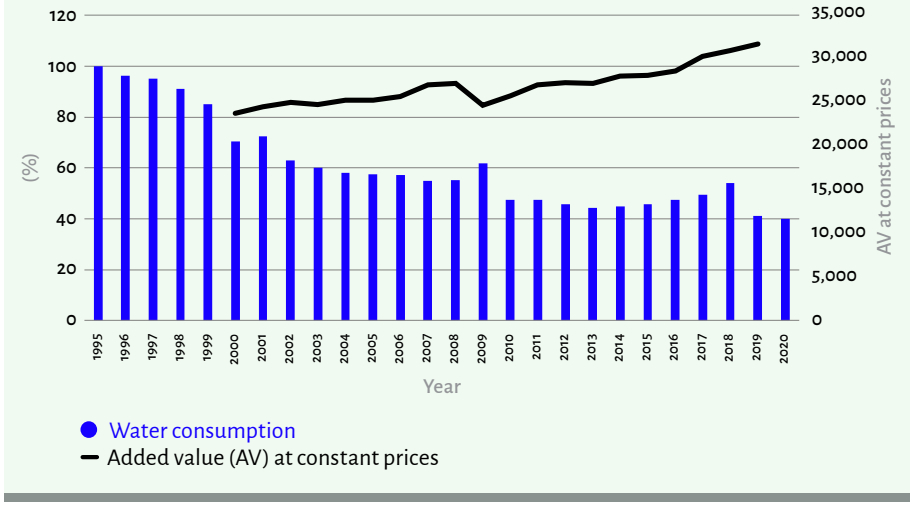
In this section only figures about the Flemish Region are given. In our next report we will aim to include figures for the Brussels and Walloon Regions as well.

TOTAL WATER CONSUMPTION

The water consumption of the technology industry has fallen sharply since 1995. The manufacturing industry recorded a 70% drop between 1995 and 2020, while the added value of our sector increased over those years. The water consumption of environmentally and energy-intensive industry decreased by 50% over the same period. The environment and energy-intensive industry has seen a slight increase in water consumption since 2015. This increase is mainly related to production expansion and additional dust control. In 2020, the water consumption of this sector will drop back to the 2013 level.

The technology industry has already made great efforts to reduce water consumption and will continue to invest heavily in innovative techniques to further reduce water consumption. We do this by optimizing production processes, reusing company waste water and switching from high-quality water sources such as groundwater to lower-quality sources such as rainwater or purified company waste water.

Total water consumption (excl. cooling water) (m^3) of the technology industry (1995 = 100%)



Source: Water consumption data of companies - Flanders Environment Agency

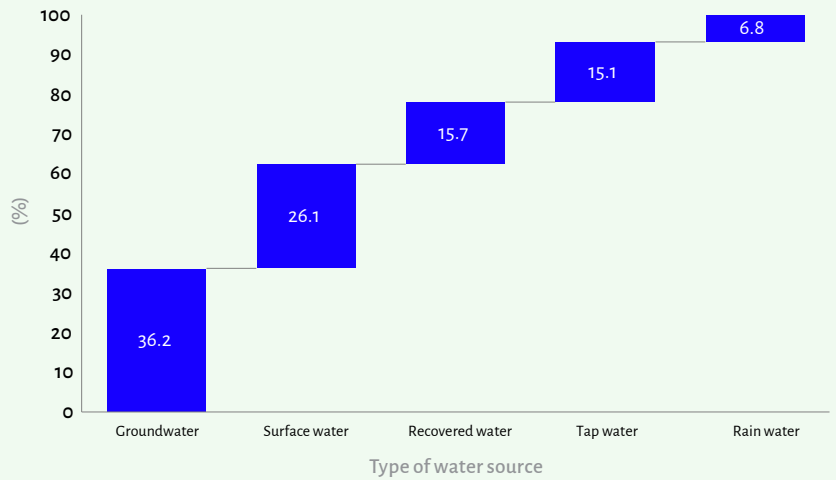
CONSUMPTION OF GROUNDWATER, SURFACE WATER AND MAINS WATER VERSUS WATER USE

Groundwater remains the main water source in the technology industry (36.2%), followed by surface water (26.1%), reclaimed water (15.7%), tap water (15.1%) and rainwater (6.8%). Approximately one fifth of the total water consumption is thus re-used.

The share of groundwater has remained roughly the same since 2008 and the share of surface water has also remained more or less constant. The environmental and energy intensive industry is the largest consumer of groundwater and surface water. In this branch of industry, groundwater accounts for two fifths of total water consumption. Three quarters of it is used in the production process. Three quarters of it is used in the production process, the remainder is used as cooling water. Approximately one third of the total water consumption consists of surface water, which is mainly used as cooling water.

In the manufacturing industry, 82% of the total water consumption consists of mains water. Groundwater accounts for 15% of water consumption and the share of rainwater is only 3%. Mains water is mainly used for production applications. 20% is used for domestic applications within the companies, such as flushing toilets, showering and cleaning offices.

Water sources of technology industry in Flanders n (2020)



Source: Survey of Agoria members (2020)

TOTAL DISCHARGE OF METALS, NUTRIENTS AND OXYGEN BINDING SUBSTANCES TO SURFACE WATER

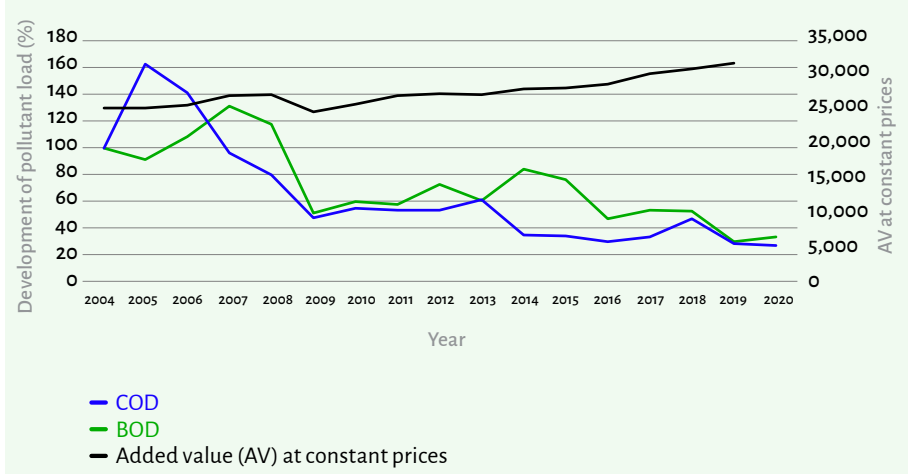
Since 1999, the average pollutant load (the amount of pollutant discharged per unit time) of all metals from the technology industry has fallen sharply. In 2020, the pollutant load was only 10% of the level in 1999. Since 2012, the pollutant load has remained more or less constant. Zinc accounts for the largest share of the total metal load (44%). Nickel and copper account for 17% and 26% respectively.

Chemical oxygen demand (COD) fell sharply between 2005 and 2009, then remained roughly constant until 2013, when it fell again. Since then, chemical oxygen demand has remained roughly constant. Biological oxygen demand (BOD) has been erratic, but has decreased by about 65% since 2004.

Metal load in surface water in the technology industry (1999 = 100%)

Source: Flanders Environment Agency. IMJV [Integral Annual Environmental Report] - company reports

Pollutant load of oxygen-binding substances in surface water in the technology industry (2004 = 100%)

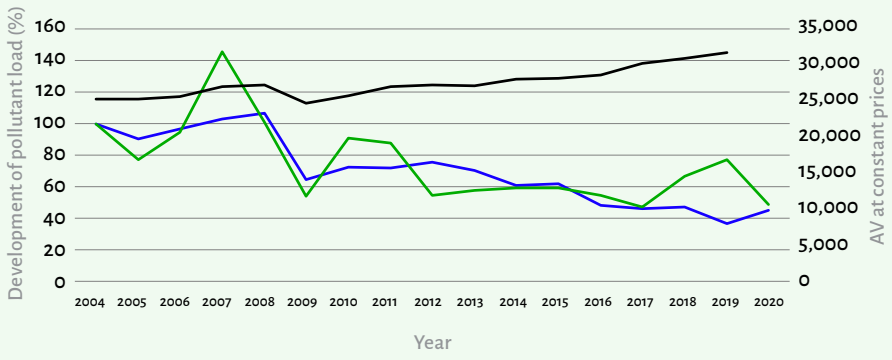


Source: Flanders Environment Agency. IMJV [Integral Annual Environmental Report] - company reports

Nitrogen load has been on a downward trend since 2008. The phosphorus load remained fairly constant between 2012 and 2017, but increased again last year. This was mainly due to the surface treatment sector. In 2020, the phosphorus load again reached the level of 2017.

Our sector continues to embrace new innovations and invest in research and development to reduce our emissions to surface water further. Many companies are already going beyond what is required by regulations.

Pollutant load of nutrients in the technology industry (2004 = 100%)



Source: Flanders Environment Agency. IMJV [Integral Annual Enviornmental Report]- company reports

TOTAL EMISSIONS OF PARTICULATE MATTER AND NON-METHANE VOLATILE ORGANIC COMPOUNDS (NMVOCS) TO AIR

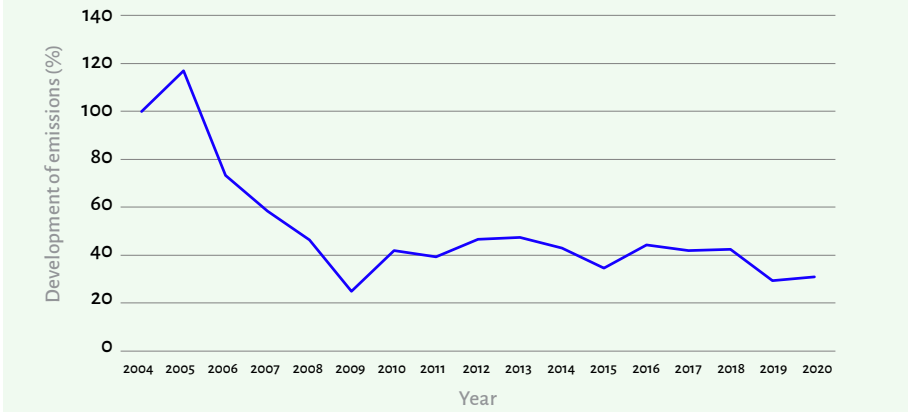
Fine dust

Emissions of particulate matter from the technology industry originate mainly from combustion processes and some production activities from the environmental and energy-intensive sectors.

The total emissions of fine dust in Flanders in 2019 were 29,500 tonnes. That is a decrease of 25% compared to 2000. Agriculture and industry are each responsible for approximately 30% of fine dust emissions. For industry, this is mainly due to the construction and demolition of buildings and non-guided emissions from storage and transhipment companies. Households and transport contribute 21% and 18% respectively.

The contribution of the technological industry to fine dust emissions in Flanders is rather limited. It is about 0.4% of the total particulate matter emissions in Flanders and less than 2% of the particulate matter emissions from industry. Fine dust emissions from the technology industry have fallen by 60% since 2000. Since 2014, emissions have remained fairly constant. 70% of the sector's fine dust emissions are due to the environmentally and energy-intensive industry. This branch of industry has reduced its particulate matter emissions by 30% compared to 2000. Metal processing reduced its emissions by 80% compared to 2000.

Fine dust emissions in the technology industry (2004 = 100%)



Source: Flanders Environment Agency. IMJV [Integral Annual Environmental Report] - company reports

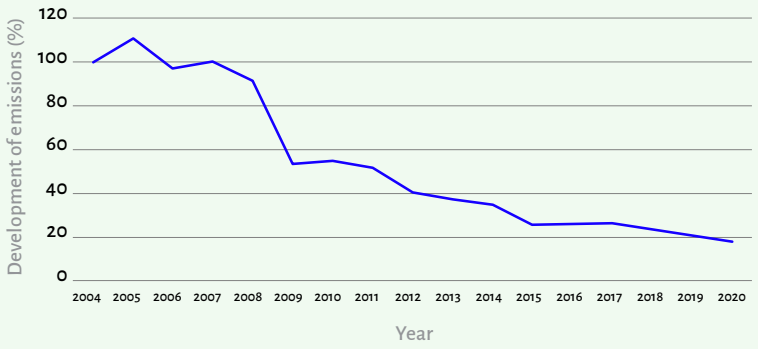
NMVOCs

NMVOCs are released during the storage and trans-shipment of solvents and fuels, and during the use of solvents in processing.

Total emissions of NMVOCs from the Belgian industry amounted to 31,770 tonnes in 2019. Emissions from households (transport, heating and cooling) amounted to approximately 30,740 tonnes of NMVOCs. The technology industry is responsible for 11% of the NMVOC emissions of the Belgian industry. Those emissions mainly (78%) come from the manufacturing industry and are due to cleaning and degreasing, and the coating of metals.

Apart from the vehicle assembly industry, the latter involves many small companies with rather limited emissions. Where possible, the manufacturing companies have already switched to low-solvent surface cleaning or coating, or invested in after-treatment equipment. As a result, NMVOC emissions from the manufacturing industry fell by 80% between 2004 and 2020.

NMVOCs emissions in the technology industry (2004 = 100%)



Source: Flanders Environment Agency. IMJV [Integral Annual Environmental Report] - company reports

ACIDIFYING DEPOSITIONS

Acidifying emissions have an adverse effect on soil biodiversity and plants. The technology industry has reduced its acidifying emissions significantly since 2012. Considering the total amount of nitrogen deposited on our soils, the contribution of the technology industry to the maximum load on the vulnerable areas of our country is less than 2%.

NUMBER OF EXPLORATORY SOIL INVESTIGATIONS STILL TO BE CARRIED OUT

Today, the number of exploratory soil investigations that still need to be carried out in Flanders is 13%. The OVAM [Public Waste Agency of Flanders] database shows that these are almost exclusively SMEs.

READ MORE

Barco

Barco's Ecoscore tool stimulates sustainable innovation

Barco makes visualization and collaboration solutions such as projectors and the well-known ClickShare system. In order to map the impact of its products and to improve them continuously, the company developed its own Ecoscore. "Our people want to bring the best products on the market, and because they value sustainability, this is part of that challenge for them."

READ MORE

Dell Technologies

Dell Technologies and its moonshot goals for social change

Dell Technologies sees the combination of human insight, data and technology as the key to the green transition. The company has in particular set up four moonshot goals and a science-based climate programme in which smart technologies such as artificial intelligence and machine learning play a central role.

READ MORE

Volvo Car Ghent

Volvo Car Ghent reduces water consumption drastically

Car manufacturer Volvo Car Ghent has for a number of years now been investing heavily in raw material efficiency. This includes sustainable water consumption, especially when rinsing cars that come out of the welding plant. The company has opted for a multi-layered approach: “In a first step, we reduce our dependence on water. By 2024, we also want to differentiate our water sources.”

AMBITION 4

Create sustainable added value

As a technology industry, we want to create as much added value for society as possible. In addition to our economic contribution to prosperity and employment in Belgium, we also maximize our social added value through technological developments in health and well-being, security, the digital society, the climate transition, etc. We guarantee this added value in the long term in all kinds of areas by continuing to invest in R&D and technological innovation. Partnerships and strategic cooperation arrangements are also indispensable to maximize our positive impact. Ethics, transparency and cyber security are essential to fulfil our social role credibly and in line with the Sustainable Development Goals.

1. Technological innovation

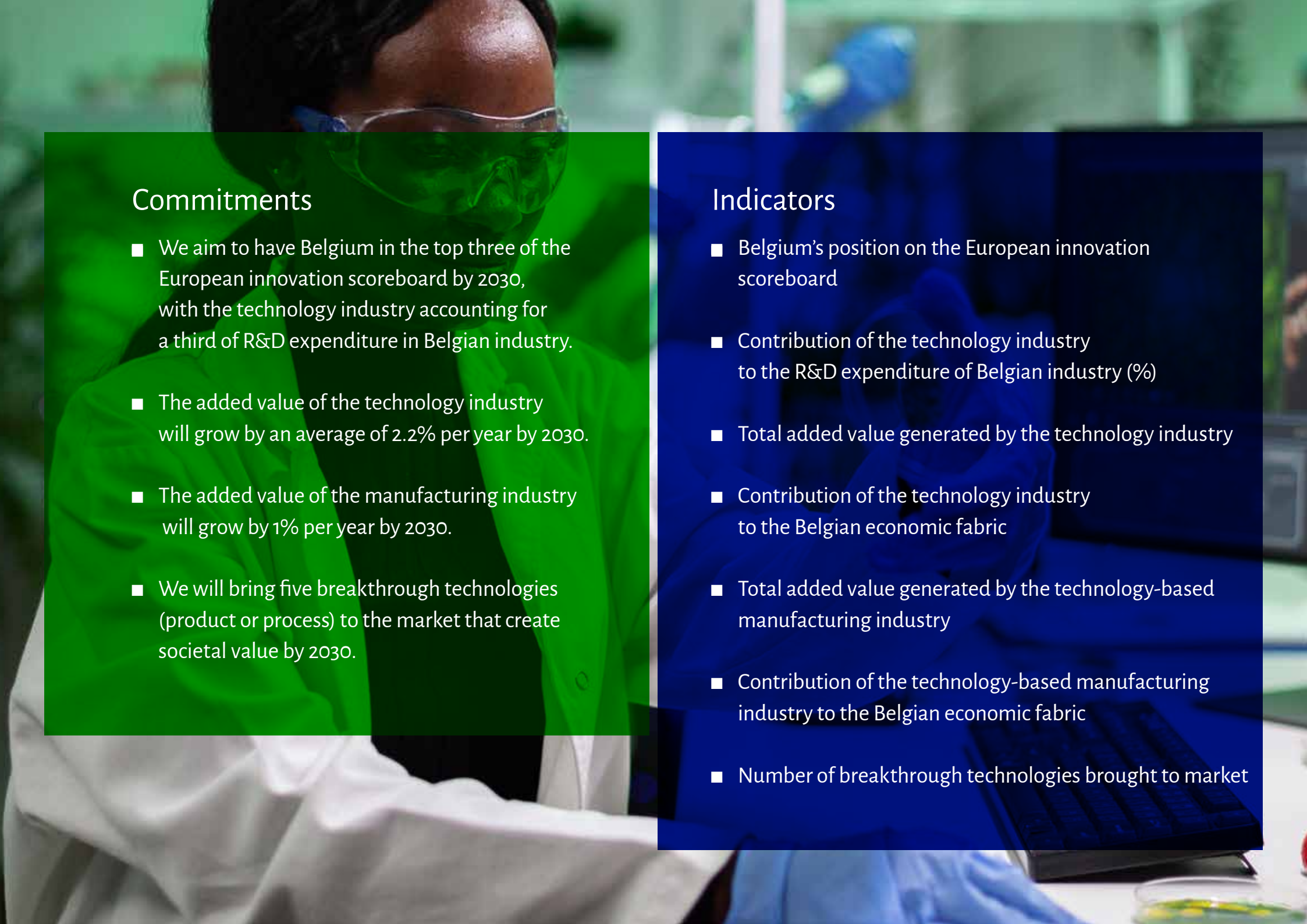
Why is this important?

Technological innovation is the driving force of our industry. Our motivation to innovate stems from the ambition to continue creating added value for society, including in the long term.

The manufacturing industry is the engine of Belgian export and prosperity. Every job in the manufacturing industry creates at least one other in related service sectors. Almost one in four Belgians earns his or her income thanks to the industry. But high labour costs, the automatic index and inflation put pressure on the added value and competitiveness of Belgian manufacturing companies. Research and development are crucial to continue creating added value and jobs from the technology industry and the manufacturing industry in particular. Only by transforming into 'factories of the future' – agile, digital, technological and people-oriented undertakings – can our manufacturing companies embed production activities sustainably in a hyper-competitive global economy. Innovation is therefore a necessary precondition to securing the long-term future of the manufacturing industry in our country.

Technology not only creates economic value, but also helps society in many other areas. For example, technology plays a key role in improving traffic safety, strengthening healthcare, fighting and dealing with pandemics, tackling the increasing ageing population, and so on. Technological innovations are also vital to the success of the green transition, just think of CO_2 capture and storage, smart energy grids or electric vehicles. In short: without technological innovation, we would live in a less safe, comfortable, healthy, sustainable and connected society.

From our sector, we strive to maximize all such positive impact of technology, while keeping an eye on related concerns, such as the ethical use of AI, the impact of technology on organizations, universal access to digitization and ensuring privacy.



Commitments

- We aim to have Belgium in the top three of the European innovation scoreboard by 2030, with the technology industry accounting for a third of R&D expenditure in Belgian industry.
- The added value of the technology industry will grow by an average of 2.2% per year by 2030.
- The added value of the manufacturing industry will grow by 1% per year by 2030.
- We will bring five breakthrough technologies (product or process) to the market that create societal value by 2030.

Indicators

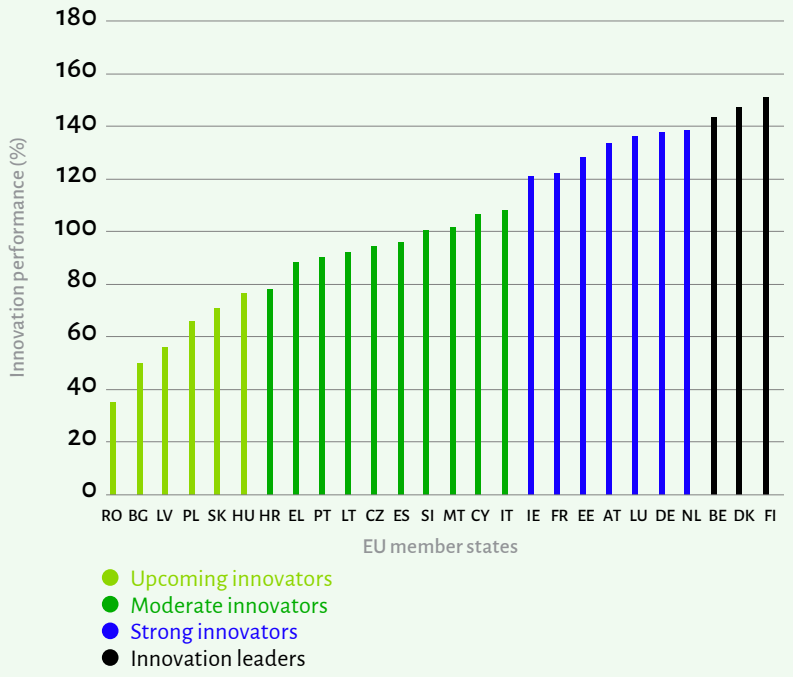
- Belgium's position on the European innovation scoreboard
- Contribution of the technology industry to the R&D expenditure of Belgian industry (%)
- Total added value generated by the technology industry
- Contribution of the technology industry to the Belgian economic fabric
- Total added value generated by the technology-based manufacturing industry
- Contribution of the technology-based manufacturing industry to the Belgian economic fabric
- Number of breakthrough technologies brought to market

Where are we today?

BELGIAN POSITION ON THE EUROPEAN INNOVATION SCOREBOARD

In 2021, Belgium was in fourth place on the European Innovation Scoreboard and is counted among the European Innovation Leaders, along with Sweden, Finland and Denmark. We aspire to be in the top three by 2030.

European Innovation Scoreboard (2021)

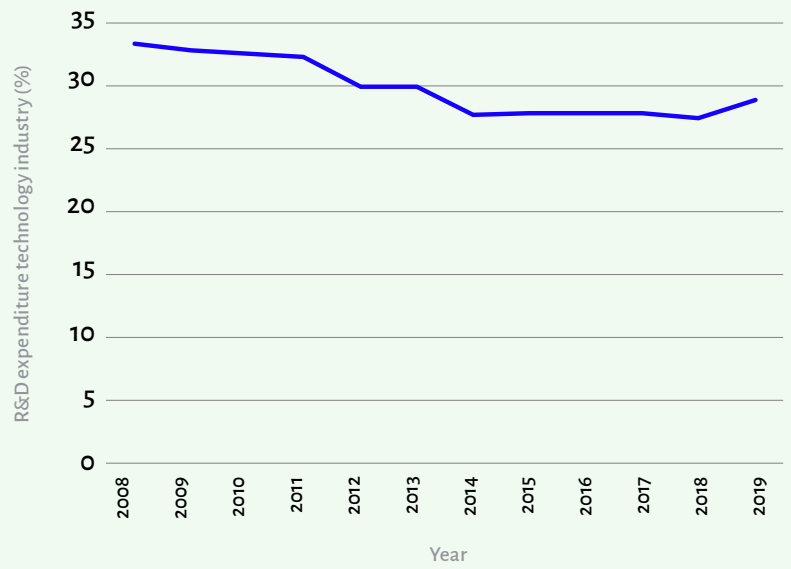


Source: European Innovation Scoreboard 2021 (European Commission)

CONTRIBUTION OF THE TECHNOLOGY INDUSTRY TO THE R&D EXPENDITURE OF THE BELGIAN INDUSTRY (%)

The total expenditure of the technology industry on R&D amounted to €3,238 million in 2019. With that amount, the technology industry financed 29% of the total Belgian R&D efforts.

R&D expenditure: share of technology industry in the Belgian economy



Sources: Commission on Federal Cooperation, CFS/STAT Consultative Group; Federal Science Policy calculations and Agoria estimates

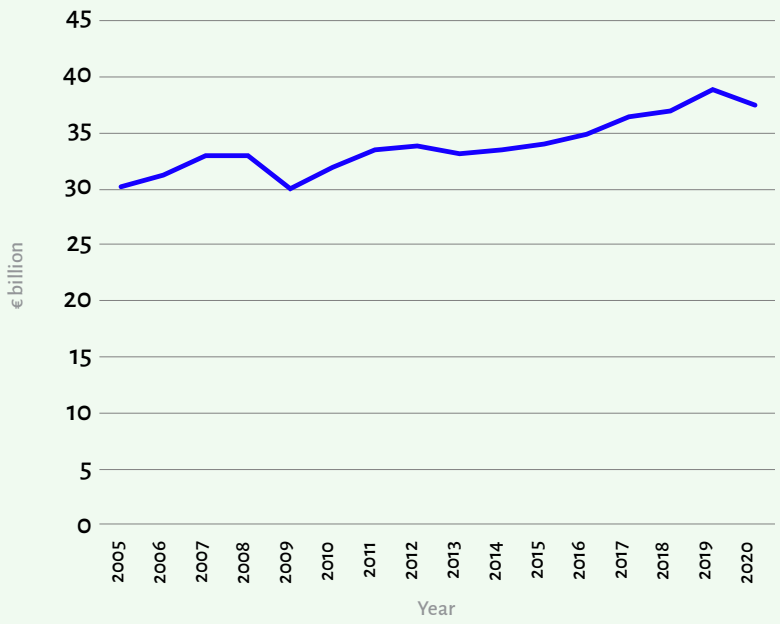
TOTAL ADDED VALUE GENERATED BY THE TECHNOLOGY INDUSTRY

The total added value of the technology industry has increased by 2.2 % over the last 10 years to a total of EUR 37.5 billion. In 2020, there was a slight decrease compared with 2019 due to the coronavirus pandemic.

The technology industry grew again in 2021 as the economy picked up in the second phase of the pandemic. In 2022, we expect growth to slow slightly. At the same time, component shortages, price increases (raw materials, energy, packaging ...) and a tightening of the labour market are expected to weigh on the sales and growth of our companies. Supply problems in areas such as chips, steel, non-ferrous metals, wood and logistics products are expected to persist into 2022, especially in the automotive and mechanical engineering sectors.

The added value is shown in nominal figures.

Total added value of the technology industry

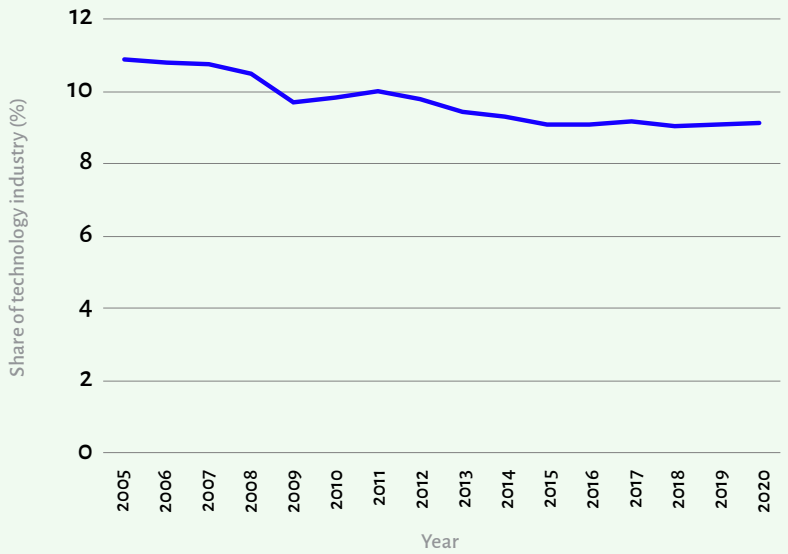


Sources: Instituut voor de Nationale Rekeningen (INR) [Institute of National Accounts] and Agoria calculations

CONTRIBUTION OF THE TECHNOLOGY INDUSTRY TO THE BELGIAN ECONOMIC FABRIC

The share of the added value of the technology industry in the added value of the entire Belgian economy was 9.1% in 2020. The contribution of the technology industry has decreased over the past 15 years. Before the economic crisis in 2009, that figure was above 10%, and had been stable since 2018.

Share of the technology industry in the Belgian economy



Source: Regional Accounts (NBB)

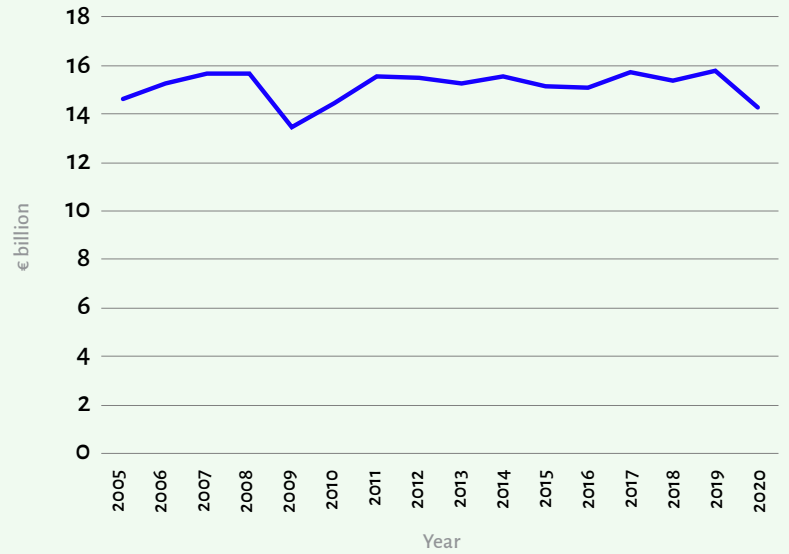
TOTAL ADDED VALUE GENERATED BY THE TECHNOLOGICAL MANUFACTURING INDUSTRY

We monitor the anchoring of the manufacturing industry in Belgium on the basis of its added value and share in the Belgian economy.

The total added value of the manufacturing industry amounted to EUR 14.3 billion in 2020. Is has decreased compared with 2019 due to the coronavirus pandemic. In the coming years, we want the added value in the manufacturing industry to grow again by 1% per year.

The added value is shown in nominal figures.

Added value of the manufacturing industry



Source: Regional Accounts (NBB)

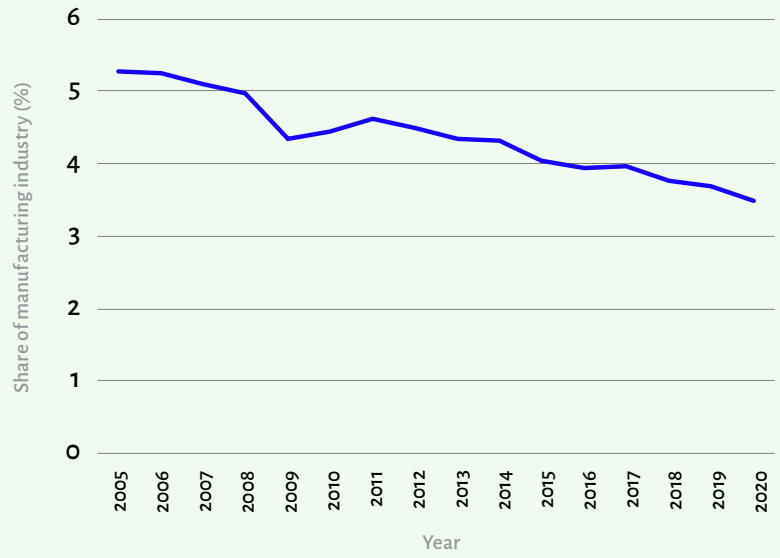
CONTRIBUTION OF THE TECHNOLOGICAL MANUFACTURING INDUSTRY TO THE BELGIAN ECONOMIC FABRIC

The share of the added value of the technological manufacturing industry in the added value of the entire Belgian economy has decreased over the last 15 years. In 2020, the contribution will be 3.5%.

NUMBER OF BREAKTHROUGH TECHNOLOGIES BROUGHT TO MARKET

We will monitor this indicator from 2022 onwards.

Share of manufacturing industry in the Belgian economy



Source: Regional Accounts (NBB)

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BSH Home Appliances

BSH Belgium reduces energy poverty in underprivileged families

BSH Home Appliances N.V. produces sustainable household appliances. It recently launched the circular energy poverty project Papillon to combat energy poverty. “We replace old household appliances from underprivileged families with new, energy-efficient appliances for a small monthly fee. The new appliances use much less energy, so they emit less CO_2 and energy costs fall.”

READ MORE

ZF Antwerp Wind Power

ZF Wind Power focuses on R&D and jobs at home

ZF Wind Power makes gearboxes for wind turbines and is a world leader in the field. The company wants to grow further in the promising market for renewable energy through innovative R&D. At the same time, it is strongly committed to local job creation.

READ MORE

John Cockerill

From steam generators to battery storage and green hydrogen

John Cockerill develops integrated solutions for customers who want to switch to renewable energy. The generation and storage of renewable energy and green hydrogen offer enormous potential. “We help our customers to green their operations and reduce their energy costs. We analyse the production process together with the customer, see where progress can be made, and provide support from design to implementation.”

2. Cooperation

Why is this important?

Today's world is changing rapidly and becoming more and more complex. Technological developments and disruptive innovations are also creating new markets and value networks. To create added value in that Volatile, Uncertain, Complex and Ambiguous (VUCA) world, collaboration is essential. Only by working together, within our sector and beyond, can we sustainably transform into the industry of the future. By joining forces, new business opportunities arise, efficiency increases and our companies strengthen their position on the labour market. Cooperation also leads to a smoother breakthrough, implementation and export of technological innovations. We also need partnerships to achieve the ambitions of our sustainability strategy and contribute to the Sustainable Development Goals.

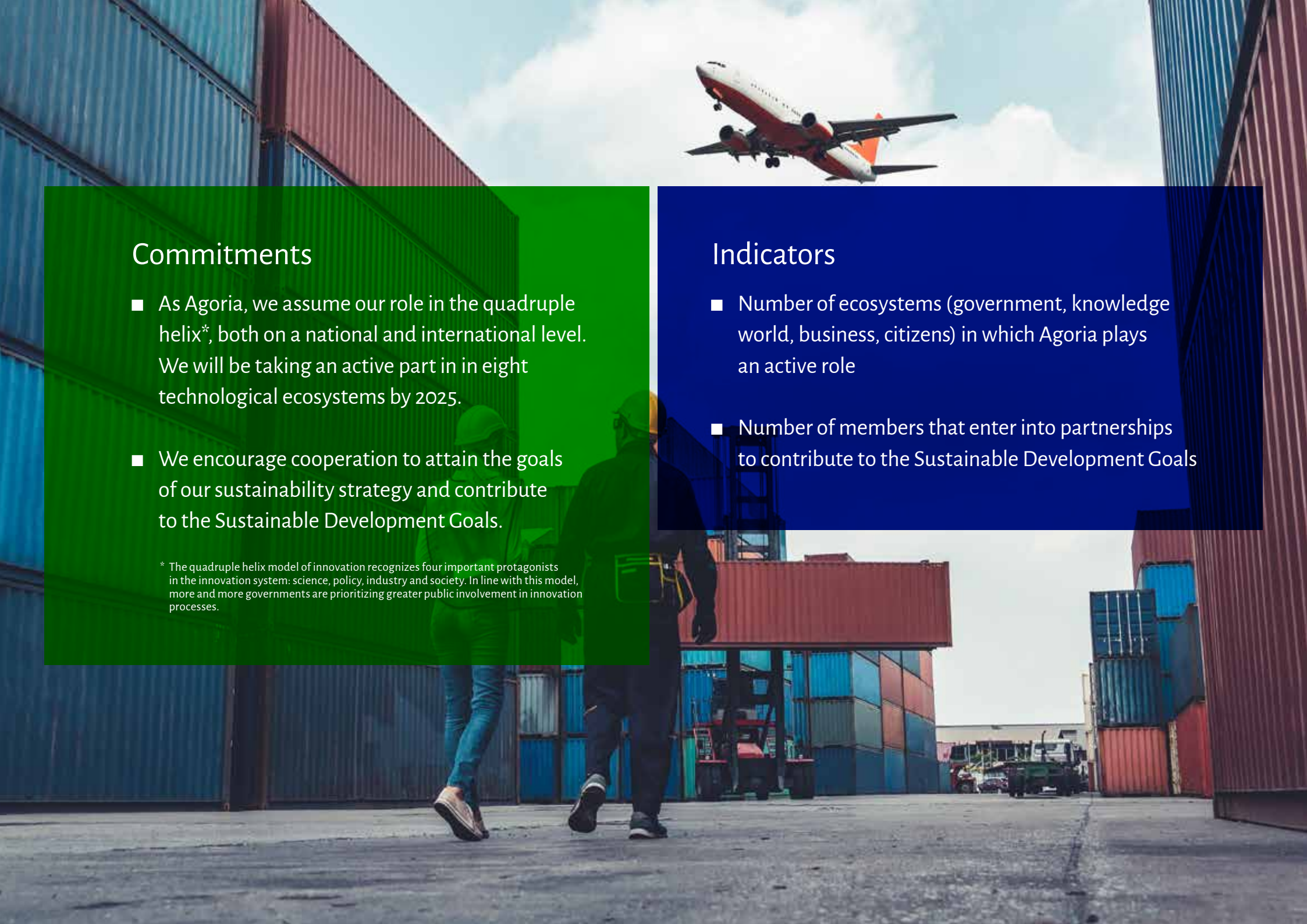
Companies from the technology industry work together with other companies, the government, knowledge institutions, NGOs and organizations, the medical world, education, consumers, etc. The process may involve joint ventures, the sharing of facilities and resources, the exchange of knowledge and expertise, chain cooperation within the framework of the circular economy, etc. Many companies from our sector work together with social organizations and customized companies to give jobs to disadvantaged groups and people who are far removed from the labour market. Many companies from our sector work together with social organizations and customized companies to provide jobs for disadvantaged groups and people who are further away from the labour market.

Agoria wants to facilitate sustainable cooperation by being the connecting factor between the various players, both at home and abroad. We also set up hubs and ecosystems, where companies, the government, knowledge institutions and citizens (for example students) work together and build up expertise around a certain technology or social problem. For instance, Agoria is one of the founders of The Beacon in Antwerp, the hub for the Internet of Things and artificial intelligence.

Better cooperation through technology

Technological developments facilitate sustainable cooperation in various fields:

- Spurred on by the coronavirus pandemic, technology has radically changed the way teams work together. Just think of the wide range of tools for online meetings and cooperation.
- The exchange of process heat between companies, the use of energy surpluses from wind turbines and solar panels, shared logistics and transport, the exchange of data in the context of the circular economy: these are all examples of industrial cooperation facilitated by the Internet of Things and other technological solutions.



Commitments

- As Agoria, we assume our role in the quadruple helix*, both on a national and international level. We will be taking an active part in in eight technological ecosystems by 2025.
- We encourage cooperation to attain the goals of our sustainability strategy and contribute to the Sustainable Development Goals.

* The quadruple helix model of innovation recognizes four important protagonists in the innovation system: science, policy, industry and society. In line with this model, more and more governments are prioritizing greater public involvement in innovation processes.

Indicators

- Number of ecosystems (government, knowledge world, business, citizens) in which Agoria plays an active role
- Number of members that enter into partnerships to contribute to the Sustainable Development Goals

Where are we today?

NUMBER OF ECOSYSTEMS (GOVERNMENT, KNOWLEDGE WORLD, INDUSTRY, CITIZEN) IN WHICH AGORIA PLAYS AN ACTIVE ROLE

Agoria and the Sirris research centre play a role in eight industrial clusters. Some are in Flanders, others in Wallonia. We assume a different role depending on the maturity of the ecosystem: we can be a co-founder, or get involved in the development or play a role in the first steps towards establishment. In 2022 the focus will be on:

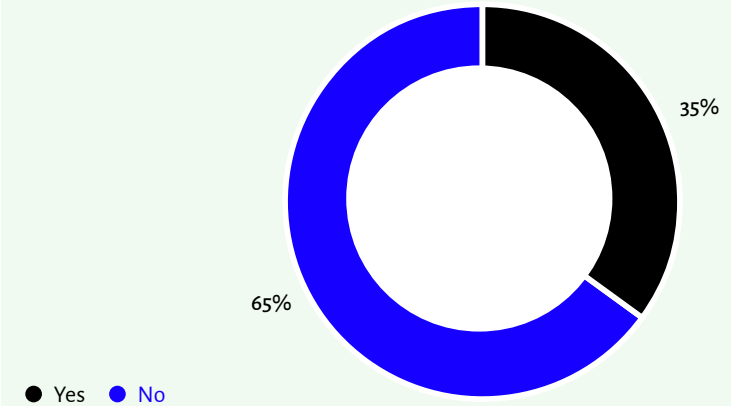
- developing further the ecosystems in Leuven (Science Park Arenberg), Kortrijk (Science Park Industry 4.0) and Charleroi (A6K E6K)
- setting up a digital hub in Walloon Brabant
- expanding the clusters in Liège (Sart-Tilman)
- continuing the cooperation with Brussels (Be.Central) and Antwerp (The Beacon)
- investigating further the possibility of an ecosystem around Genk (Thorpark)

NUMBER OF MEMBERS ENTERING INTO PARTNERSHIPS TO CONTRIBUTE TO THE SUSTAINABLE DEVELOPMENT GOALS

Companies in the technology industry are increasingly entering into partnerships to achieve their sustainable goals. In our member survey, 35% of the companies indicated that they are already working with partners to achieve the SDGs. Cooperation takes place mainly on social themes, such as the fight against poverty, digital inclusion and education for underprivileged children.

In addition, companies are entering into partnerships with governments, organizations and citizens in the field of energy and climate. For example, companies work together with cities and municipalities to reuse the residual heat from their production processes to heat homes.

Number of members entering into partnerships or cooperation arrangements to achieve the SDGs (2020)



Source: Agoria member survey (2020)

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Orange Belgium

Orange Belgium supports medical transport using drones

Since 2019, Orange Belgium has since 2019 been taking part in the research project HAI-SCS, which focuses the use of drones for medical transport. The internet provider hopes to be able to deploy the innovative 5G standalone technology required for this much more frequently in the long run. “We are aiming for more projects in the industrial world, such as the autonomous transport of chemicals at chemical production sites in the port of Antwerp.”

READ MORE

Absolem & CadCorner

Augmented reality as a service: Absolem and CadCorner join forces

AR-as-a-service is a collaborative project of the companies Absolem and CadCorner. Their aim is to give SMEs access to augmented reality, a technology that until now was only within the reach of large companies. “SMEs need to know what technology is available and how they can use it. AR is part of that. It is no longer science fiction, but a mature technology.”

READ MORE

Agoria Solar Team

Agoria's solar car emphasizes the importance of partnerships

Partnerships are in Agoria's DNA. After all, you can achieve more together than alone. For example, Agoria supports the Agoria Solar Team, a team of engineering students which builds a solar car with the help of Belgian companies. "Our goals are partly the same: stimulating young entrepreneurship, promoting STEM disciplines, distributing sustainable technologies more widely... We also want to spread the love for technology in the broader society."

3. Ethics, transparency and cybersecurity

Why is this important?

Ethics and transparency

The impact of technology on people and society is increasing. We consider it our role as a technology industry to reflect on that impact. For example, new technologies can create new ethical dilemmas and issues. A case in point: as healthcare becomes increasingly digital, decisions about human health are made on the basis of data. Or: how do we ensure access to digital technology for all?

Doing business in an honest and ethical way is also increasingly important for our stakeholders: customers, investors, suppliers, employees, job applicants, consumers, the general public ... Organizations and people rightly expect business to give them insight into their environmental and social impacts and their contribution to society. A study by temporary employment agency Tempo Team* shows that today one out of three employees takes corporate social responsibility into account when choosing his or her future employer. In the war for talent, social responsibility and sustainability communication are therefore becoming decisive for companies.

Spurred by (the revision of) the European Corporate Sustainability Reporting Directive (CSRD), the importance of transparency in business is growing. From 2023 onwards, all large companies and listed SMEs will be required to publish information on their non-financial performance and risks on an annual basis. The revision, together with the Taxonomy Regulation, is part of the package of measures that Europe is introducing to channel more money towards sustainable activities and businesses and thus bring the ambitions of the Green Deal to fruition.

New European regulations on due diligence have also come into force since the beginning of 2022. As a result, large companies and SMEs from high-risk sectors are required to address human rights and environmental risks throughout their business operations, including their supply chains. Companies are also required to involve their stakeholders in the preparation of these due diligence plans.

Cyber security

Cybercrime can have major consequences for companies and their customers. It can lead to large financial losses and damage the image of a company and the trust of customers, especially if valuable information is stolen. Proper protection is therefore indispensable.

In a nutshell, data protection is about confidentiality, integrity and availability (CIA): information must be seen by the right people, it must be reliable and it must be available at the right time to protect the continuity of the company. Companies must comply with European and other regulations on data security, such as the European Data Protection Regulation (GDPR) and the new Cyber Security Directive (NIS 2.0).

Protecting digital information – cybersecurity – has technological, process and human aspects. For example, IT systems must not have any weaknesses, but employees must also be made aware of the risks. The technology industry therefore pays a lot of attention to raising awareness about cyber security. This is necessary, because many Belgian companies are potentially vulnerable. Small companies run just as much or even more risk than large companies. This is because they have limited knowledge and resources to implement cyber security.

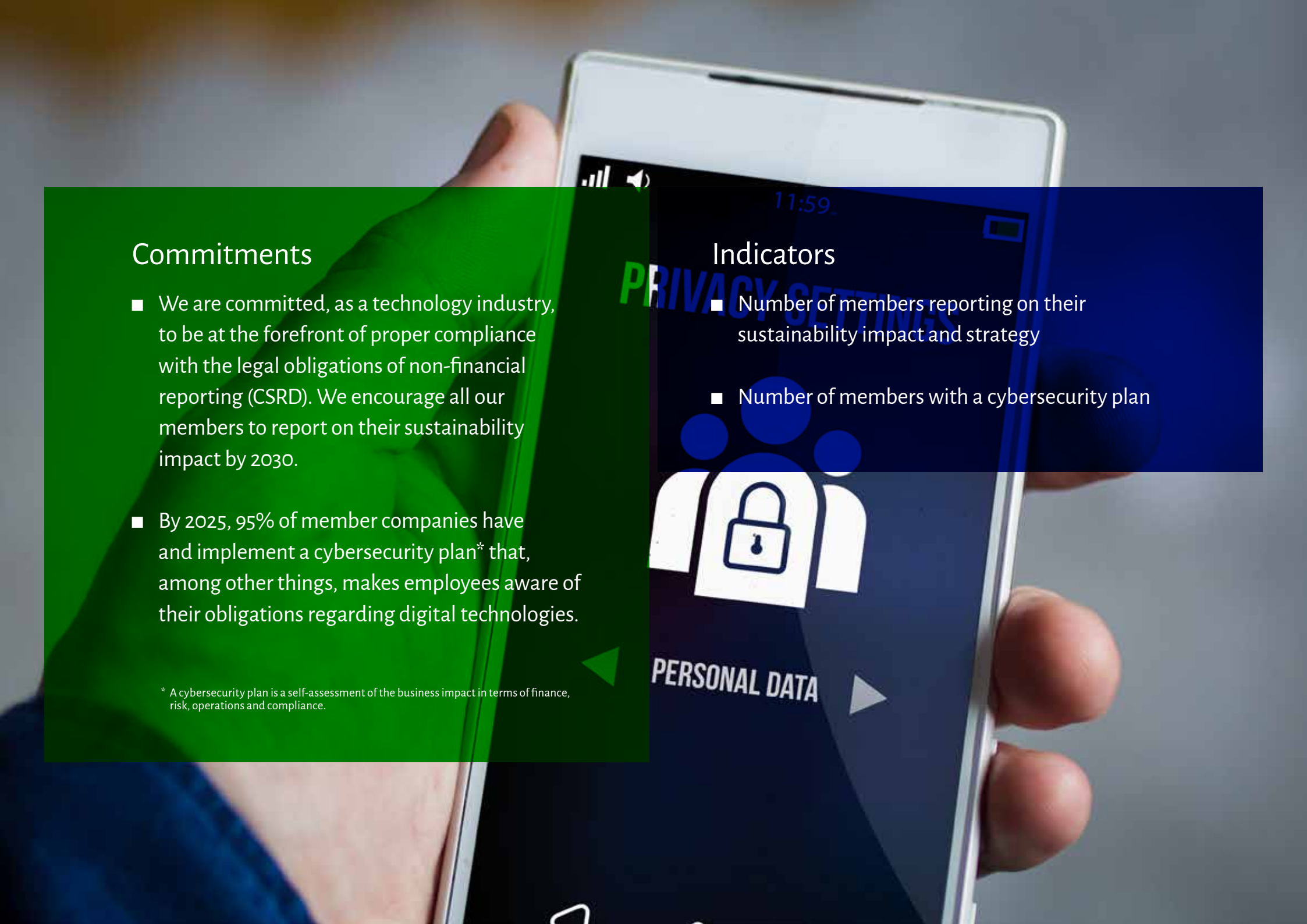
* Good intentions for 2020: 53% of Belgian employees want to work in a more climate-friendly way (prezly.com)

Moreover, many companies underestimate the risks. Recent research shows that about half of all companies in the manufacturing industry do not consider themselves a potential target. They also consider Belgium to be a relatively safe country in terms of data, in contrast to the US, for example. Nevertheless, Belgium is also suffering from cyberattacks, and these are also targeting small, less well-protected companies. In 2021, more than a thousand Belgian companies fell victim to a cyber-attack, in most cases by their own staff or subcontractors.

In the short and medium term, we want to work mainly on raising awareness about the importance of cybersecurity, recruitment (attracting and training enough talent to guarantee cybersecurity) and mapping the Belgian cybersecurity sector.

Cybersecurity solutions developed by the technology industry

The technology industry offers numerous security solutions to contain the risks of information leaks and cyberattacks. For example, companies can store data in the cloud to create more capacity, and they can install firewalls or intrusion prevention systems. There are also a variety of intelligent monitoring tools, such as AIs that detect unusual, inappropriate or inadequate data activity. Other IT security controls include certificates that guarantee the authenticity of a website, Threat Intelligence platforms that allow anticipation of cyber threats, Zero Trust models that require validation for every digital step, and so on. Companies from our sector help other companies to implement these systems and build a secure IT environment.



Commitments

- We are committed, as a technology industry, to be at the forefront of proper compliance with the legal obligations of non-financial reporting (CSRD). We encourage all our members to report on their sustainability impact by 2030.
- By 2025, 95% of member companies have and implement a cybersecurity plan* that, among other things, makes employees aware of their obligations regarding digital technologies.

* A cybersecurity plan is a self-assessment of the business impact in terms of finance, risk, operations and compliance.

Indicators

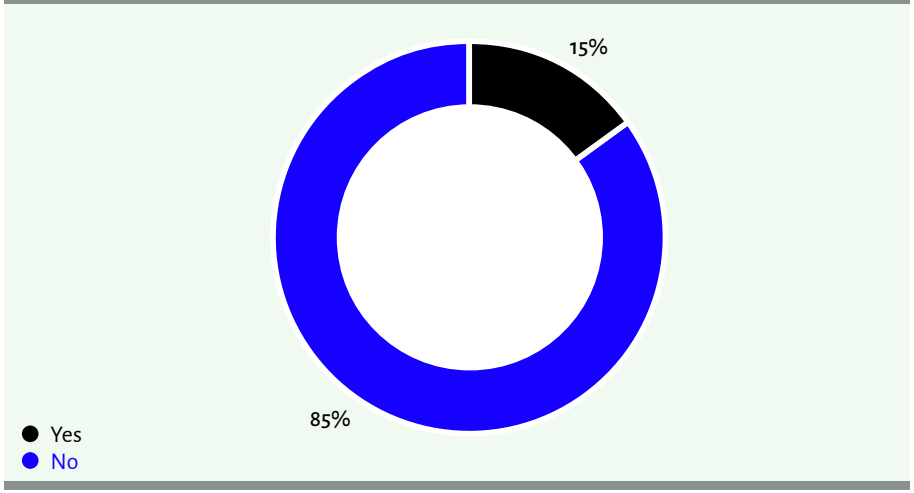
- Number of members reporting on their sustainability impact and strategy
- Number of members with a cybersecurity plan

Where are we today?

NUMBER OF MEMBERS REPORTING ON THEIR SUSTAINABILITY IMPACT AND STRATEGY

15% of the respondents to our members' survey confirmed that they publish a sustainability report. The European directives on corporate sustainability reporting and due diligence will increase this share in the coming years. Today, the EU rules on non-financial reporting only apply to companies with more than 500 employees. Across the EU, this concerns approximately 11,700 companies, including some 70 Agoria member companies in Belgium. As a result of the revision of the directive, 50,000 companies throughout Europe will have to publish a sustainability report; within Agoria, this concerns some 70 additional companies. In addition, smaller companies which do not fall under the new requirement will also have to publish a sustainability report if they want to continue working for larger companies in the future.

Number of members that have published a sustainability report (2020)



Source: Survey of Agoria Members (2020)

NUMBER OF MEMBERS WITH A CYBERSECURITY PLAN

To increase security, companies must first map out their level of cybersecurity. This can be done with the newly developed CyberScan or with another tool. If cybersecurity is still in its infancy, the first step is to raise awareness within the company. Companies that have already taken measures would do well to carry out a vulnerability assessment or to test the consequences of a cyberattack with a penetration test (pen test).

Finally, a cybersecurity plan is drawn up with an accompanying roadmap: what is the company going to invest in, who will be responsible for cybersecurity within the company, which training courses will be provided, how does the company react in the event of a cyberattack, how does it communicate with customers, etc.

By 2025 Agoria wants to convince and support at least 95% of the member companies to map out their cyber security and draw up a plan. From 2022 onwards we will be questioning our members about this.

READ MORE

Umicore

“Transparency creates trust”

Belgian multinational Umicore is a world leader in clean mobility materials and recycling. The company attaches great importance to transparency and corporate social responsibility: “By clearly showing people what we do and what our challenges are, we create trust.”

READ MORE

Telenet

Telenet launches affordable internet for underprivileged people

The COVID-19 crisis forced Telenet to face the facts: many people in Belgium still cannot afford a quality internet connection. In cooperation with social organizations, the company developed two affordable internet formulas for people in disadvantaged circumstances. Five and Ten cost €5 and €10 a month respectively and provide access to mobile and fixed Internet.

READ MORE

Aurubis Beerse

“Transparency is important for our credibility”

Bringing recycled materials back into the value chain: that is the main objective of Aurubis Beerse (formerly Metallo), part of the Aurubis Group. The recycling company extracts metals from low-grade materials such as ashes and puts them back on the market. Transparency is very important to Aurubis Beerse: “Our customers want to be sure they are buying sustainable metals.”

READ MORE

NVISO

NVISO secures the technology behind the green transition

The transition to a sustainable economy is often accompanied by an increased use of digital technology. As the importance of our IT infrastructure grows, so does the need for security. NVISO helps companies to build a secure IT environment and resolve incidents. “We can save a lot of energy with smart digitalization, but if everyone is afraid of hackers, no one will start.”

READ MORE

Apogado

“Privacy and data protection are becoming increasingly important”

Consultancy firm Apogado assists companies and organizations with information security and privacy policies. It examines what data its customers collect, and whether the data are properly protected and processed in accordance with legislation. “Data are extremely important for companies today. You can maximize their potential by handling them in a secure and sustainable way.

Overview of all indicators

Status of sustainability performance	Baseline	2016	2017	2018	2019	2020	2021	Target
Caring for people								
Sustainable employment								
Number of people aged 20 to 64 in employment in Belgium (%)		67.68	68.51	69.72	70.50	70.03	71.40	
Number of people aged 20 to 64 in employment in the technology industry	2021	296,188	300,846	305,938	312,253	312,883	314,398 (Q1)	+40,000 jobs by 2030
Number of situations vacant in the technology industry (Q4)		13,120	13,930	13,880	13,190	20,870		
Number of companies that have a programme or tool at their disposal to identify the necessary competencies of their employees							Monitoring as of 2022	
Diversity and inclusion								
Number of women in leadership positions							10%	25% by 2025
Male/female ratio in the technology industry							80/20% (Q1)	
Age pyramid in the technology industry - see figures								
Number of initiatives launched to promote digital competencies							Monitoring as of 2022	
Safety and well-being (annual reports of internal service of member companies)								
Occupational accident frequency rate in the technology industry			12.69	11.9	10.76	9.33		
Actual degree of severity of occupational accidents in the technology industry			0.34	0.33	0.3	0.25		
Overall degree of severity of occupational accidents in the technology industry			0.64	0.76	0.72	0.63		
Total number of occupational diseases reported		193	210	204	204	116		
Absenteeism (longer than six months)							Monitoring as of 2022	

Status of sustainability performance	Baseline	2016	2017	2018	2019	2020	2021	Target
Contribute to a better society								
Digitalization								
DESI Index: integration of digital technology							6th place	3rd place by 2025
DESI index: Belgian position based on the survey on the contribution of digital technologies to the environmental sustainability actions of EU companies							Belgium 18% European average 27%	Belgium = European average by 2025
Mobile society								
Number of member companies that have a mobility plan							Monitoring as of 2022	50% by 2025
Data economy								
Number of member companies that apply data analytics					40%			60% by 2025
Value of the data economy (in billion euros)		7.731	8.826	10.132	10.919	12.287		€21 billion in 2025

Status of sustainability performance	Baseline	2016	2017	2018	2019	2020	2021	Target
Protect the environment and the planet								
Climate action								
Total energy consumption (terajoule)		40,088.79	40,195.70	40,854.07	39,327.75			European Fit for 55 objective
Total energy intensity (TJ)/€ million (incl. heat) 2008=100)		86.57	81.97	81.49	75.25			European Fit for 55 objective
Share of renewable energy in total energy supply							Monitoring as of 2022	European Fit for 55 objective
CO_2-eq emissions (scope 1 and 2) (kt CO_2-eq)		2,945.00	2,994.21	3,106.30	2,713.00			European Fit for 55 objective
Percentage of climate-neutral buildings in Belgium							4%	30% by 2025
% of company fleet powered by zero-emission technology (excl. heavy-duty transport)							Monitoring as of 2022	By 2025 every new commercial vehicle in the technology industry (excluding heavy duty vehicles) will be driven by zero-emission technology
Circular economy								
Total waste production (secondary raw materials, tonnes)		997,346 (1,004,926)		986,930 (752,115)				
Number of member companies in the manufacturing industry working on a circular project							Monitoring as of 2022	50% by 2030
Number of circular projects supported by Agoria and Sirris							Monitoring as of 2022	
Protection of the environment								
Total water consumption of the technology industry (1995 = 100%)		48	50	54	41	40		
Share of groundwater in total water consumption						36.2%		
Share of surface water in total water consumption						26.1%		
Share of tap water in total water consumption						15.1%		
Share of tap water in total water consumption						15.7%		
Share of rainwater in total water consumption						6.8%		
Total nitrogen discharge in surface water (2004=100%)		21	9	13	10	11		
Total nitrogen discharge in surface water (2004=100%)		48	46	47	37	45		
Total phosphorus discharge in surface water (2004=100%)		55	47	67	77	49		
Total discharge BOD (2004=100%)		47	54	52	30	33		
Total discharge COD (2004=100%)		30	33	47	28	27		
Total emission of fine dust into the air (2004=100%)		44	41	42	29	30		
Total emission of NMVOCs (non-methane volatile organic compounds) into the air (2004=100%)		26	26	23	20	18		
Acidifying depositions							<2% of the maximum load	
Number of exploratory soil tests still to be carried out						13%		

Overview of all indicators

Status of sustainability performance	Baseline	2016	2017	2018	2019	2020	2021	Target
Create sustainable added value								
Technological innovation								
Belgian position on the EU innovation scoreboard							4th place	top 3 by 2030
Contribution of the technology industry to the R&D expenditure of Belgian industry (%)		28.06	28.08	27.56	29.06			33% by 2030
Total added value generated by the technology industry (in billion euros)		34.813	36.475	37.041	38.824	37.468		+2.2% average annual growth until 2030
Contribution of the technology industry to the Belgian economic fabric (%)		9.07	9.19	9.03	9.09	9.14		
Total added value generated by the technological manufacturing industry (in billion euros)		15.089	15.695	15.397	15.788	14.252		+1% growth per year until 2030
Contribution of the manufacturing industry to the Belgian economic fabric (%)		3.93	3.95	3.75	3.70	3.48		
Number of breakthrough technologies brought to market							Monitoring as of 2022	5 breakthrough technologies by 2030
Cooperation								
Number of ecosystems in which Agoria plays an active role							current	8 by 2025
Number of members entering into partnerships to achieve the SDGs						35%		
Ethics, transparency and cybersecurity								
Number of members that report on their sustainability impact and strategy						15%		
Number of members with a cybersecurity plan							Monitoring as of 2022	95% by 2025

GRI standards reference table

GENERAL DISCLOSURES 2016			
GRI	**GRI Description**	**Disclosure**	**Page**
Organizational profile			
102-1	Name of the organization	About Agoria	10
		About this report	127
102-2	Activities, brands, products and services	About Agoria	10
		About the technology industry	11
102-3	Location of headquarters	About this report	127
102-4	Location of operations	About Agoria	10
		Agoria Website > About us	
102-5	Ownership and legal form	About this report	127
102-6	Markets served	About Agoria	10
		About the technology industry	
102-7	Scale of the organization	About Agoria	10
		About the technology industry	11
102-8	Information on employees and other workers	About Agoria	
		About the technology industry	11
102-9	Supply chain	About the technology industry	10
		Agoria represents the technology companies in Belgium. The technology industry with its great diversity of companies, products, services and markets results in very complex supply chains.	
102-10	Significant changes to the organisation and its supply chain	Not applicable (first report)	
102-11	Precautionary Principle of approach	Message from the CEO and the Chairman	4 - 9
102-12	External initiatives	Annexes > External initiatives and partnerships	125
102-13	Membership of associations	Annexes > External initiatives and partnerships	125
Strategy			
102-14	Statement from senior decision-maker	Message from the CEO and the Chairman	4 - 9
Ethics and integrity			
102-16	Values, principles, standards and norms of behavior	Agoria Website > About us	

GRI standards reference table

GENERAL DISCLOSURES 2016			
GRI	**GRI Description**	**Disclosure**	**Page**
Governance			
102-18	Governance structure	Agoria Website > About us Agoria is an association of natural persons and legal entities established in Belgium who carry out technology-driven activities or provide services.	
Stakeholder engagement			
102-40	List of stakeholder groups	Annexes > Stakeholder consultation Our strategy > How was our strategy developed?	123 15 - 18
102-41	Collective bargaining agreements	These data are not available at sector level. Belgian labour legislation lays down a number of guidelines with respect to collective bargaining agreements between the employer and the employee. These guidelines apply to Agoria's member companies.	
102-42	Identifying and selecting stakeholders	Annexes > Stakeholder consultation Our strategy > How was our strategy developed?	123 15 - 18
102-43	Approach to stakeholder engagement	Annexes > Stakeholder consultation Our strategy > How was our strategy developed?	123 15 - 18
102-44	Key topics and concerns raised	Annexes > Stakeholder consultation Our strategy > How was our strategy developed?	123 15 - 18
Reporting practice			
102-45	Entities included in the consolidated financial statements	Annexes > Data and data range The information included is a compilation of data from companies in the technology industry, as indicated in the methodology.	124 - 125
102-46	Defining report content and topic Boundaries	Annexes > Content of the report	123 - 124
102-47	List of material topics	Our strategy > How was our strategy developed?	15 - 18
102-48	Restatements of information	Not applicable (first report)	
102-49	Changes in reporting	Not applicable (first report)	
102-50	Reporting period	About this report	127
102-51	Date of most recent report	About this report	127
102-52	Reporting cycle	About this report	127
102-53	Contact point for questions regarding the report	About this report	127
102-54	Claims of reporting in accordance with the GRI Standards GRI standards referentie tabel	Annexes > Content of the report GRI standards reference table	123 - 124 116 - 122
102-55	GRI content index	GRI standards reference table	116 - 122
102-56	External assurance	Annexes > Content of the report	123 - 124

MATERIAL TOPICS, BOUNDARIES, MANAGEMENT APPROACH AND INDICATORS			
Topic	**GRI Description**	**Disclosure**	**Page**
Other economic topics			
Data economy			
103-1 - 103-3	Management approach	Data economy	52 - 55
Own indicator	Number of member companies that apply data analytics	Data economy > Number of member companies applying data analytics (monitoring as of 2022)	56
Own indicator	Value of the data economy	Data economy > Value of the data economy	56
Technological innovation			
103-1 - 103-3	Management approach	Technological innovation	90 - 91
Own indicator	Belgian position on the European innovation scoreboard	Technological innovation > Belgian position on the European innovation scoreboard	92
Own indicator	Contribution of the technological industry to the R&D expenditure of Belgian industry (%)	Technological innovation > Contribution of the technological industry to the R&D expenditure of Belgian industry (%)	92
Own indicator	Total added value generated by the technological industry	Technological innovation > Total added value generated by the technological industry	93
Own indicator	Contribution of the technological industry to the Belgian economic fabric	Technological innovation > Contribution of the technological industry to the Belgian economic fabric	94
Own indicator	Total added value generated by the technology industry	Technological innovation > Total added value generated by the technological industry	94
Own indicator	Contribution of the technology-based manufacturing industry to the Belgian economic fabric	Technological innovation > Contribution of the technology-based manufacturing industry to the Belgian economic fabric	95
Own indicator	Number of breakthrough technologies brought to market	Technological innovation > Number of breakthrough technologies brought to market (monitoring as of 2022)	95
Environmental			
Energy 2016			
103-1 - 103-3	Management approach	Climate action	60 - 63
302-1	Energy consumption	Climate action > Total energy consumption Climate action > Climate action > Share of renewable energy in the total energy supply of the technology industry (monitoring as of 2022)	64 66
302-3	Energy intensity	Climate action > Energy intensity	64

GRI standards reference table

MATERIAL TOPICS, BOUNDARIES, MANAGEMENT APPROACH AND INDICATORS			
Topic	**GRI Description**	**Disclosure**	**Page**
Water and effluents 2018			
103-1 - 103-3	Management approach	Protection of the environment	77 - 79
303-1	Interaction with water as a shared resource	Protection of the environment	77 - 79
303-2	Management of water discharge-related impacts	Protection of the environment	77 - 79
303-3	Water withdrawal	Protection of the environment > Consumption of groundwater, surface water and tap water versus water reuse	81
303-4	Water discharge	Protection of the environment > Total discharge of metals, nutrients and oxygen-binding agents to surface water	83 - 84
303-5	Water consumption	Protection of the environment > Total water consumption	80
Emissions 2016			
103-1 - 103-3	Management approach	Climate action	60 - 63
305-1	Direct (Scope 1) GHG emissions	Climate action > CO_2-eq emissions of the technology industry (scope 1 and 2)	65
305-2	Indirect (Scope 2) GHG emissions	Climate action > CO_2-eq emissions of the technology industry (scope 1 and 2)	65
305-3	Other indirect (Scope 3) GHG emissions	Climate action > % of the company fleet powered by zero-emission technology (excl. heavy duty vehicles, monitoring as of 2022)	66
305-5	Reduction of GHG emissions	Climate action > CO_2-eq emissions of the technology industry (scope 1 and 2)	65
305-7	Nitrogen oxides (NO_x), sulfur oxides (SO_x), and other significant air emissions	Protection of the environment > Total emission of fine dust and NMVOCs into the air	85 - 86
Own indicator	Percentage of climate-neutral buildings in Belgium	Climate action > Percentage of climate-neutral buildings	66
Own indicator	Acidifying depositions	Protection of the environment > Acidifying deposition rates	86
Own indicator	Number of exploratory soil tests that still need to be carried out	Protection of the environment > Number of exploratory soil tests still to be carried out	86
Waste 2020			
103-1 - 103-3	Management approach	Circular economy	69 - 71
306-1	Waste generation and significant waste-related impacts	Circular economy	69 - 71
306-2	Management of significant wasterelated impacts	Circular economy	69 - 71
306-3	Waste generated	Circular economy > Total waste production	72
Own indicator	Number of member companies in the manufacturing industry working on a circular project	Circular economy > Number of member companies in the manufacturing industry working on a circular project (monitoring as of 2022)	72 - 73
Own indicator	Number of circular projects supported by Agoria and Sirris	Number of circular projects supported by Agoria and Sirris (monitoring as of 2022)	73

MATERIAL TOPICS, BOUNDARIES, MANAGEMENT APPROACH AND INDICATORS			
Topic	**GRI Description**	**Disclosure**	**Page**
Social			
Employement 2016			
103-1 - 103-3	Management approach	Sustainable employment	20 - 21
401-1	New employee hires and employee turnover	Sustainable employment > Number of peopled aged 24 to 64 in employment (Belgium)	22
Own indicator	Number of vacancies in the technological industry	Sustainable employment > Number of people employed in the technology industry	22
Own indicator	Number of companies that have a programme or tool at their disposal to map the required competencies of their employees	Sustainable employment > Number of companies having a programme or tool at their disposal to map the required competences of their employees (monitoring as of 2022 onwards)	23
Occupational Health and Safety 2018			
103-1 - 103-3	Management approach	Safety and well-being	34 - 35
403-1	Occupational health and safety management system	Safety and well-being	34 - 35
		Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	
403-2	Hazard identification, risk assessment, and incident investigation	Safety and well-being Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	34 - 35
403-3	Occupational health services	Safety and well-being Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	34 - 35
403-4	Worker participation, consultation, and communication on occupational health and safety	Safety and well-being Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	34 - 35
403-5	Worker training of worker health	Safety and well-being Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	34 - 35
403-6	Promotion of worker health	Safety and well-being Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	34 - 35

MATERIAL TOPICS, BOUNDARIES, MANAGEMENT APPROACH AND INDICATORS			
Topic	**GRI Description**	**Disclosure**	**Page**
Social			
Occupational Health and Safety 2018			
403-7	Prevention and mitigation of occupational health and safety impacts directly linked by business relationships	Safety and well-being Agoria is a sector organization and represents the technology companies in Belgium. The information is not available at sector level, but it is available and applied at the level of individual technological companies.	34 - 35
403-9	Work-related injuries	Safety and well-being > Frequency rate of occupational accidents in the technology industry Safety and well-being > Actual and overall degree of severity of occupational accidents in the technology industry	36 36
403-10	Work-related ill health	Safety and well-being > Total number of occupational diseases declared	37
Own indicator	Absenteeism	Safety and well-being > Absenteeism (longer than six months, to be monitored as of 2022)	37
Diversity and equal opportunity 2016			
103-1 - 103-3	Management approach	Diversity and inclusion	26 - 27
405-1	Diversity of governance bodies and employees	Diversity and inclusion > Male/female ration in the technology industry (Belgium) Diversity and inclusion > Age pyramid in the technology industry (Belgium)	29 30
Own indicator	Number of women in leadership positions	Diversity and inclusion > Number of women in leadership positions	28
Own indicator	Number of initiatives launched to promote digital competencies	Diversity and inclusion > Number of initiatives launched to promote digital competencies (monitoring as of 2022)	31

MATERIAL TOPICS, BOUNDARIES, MANAGEMENT APPROACH AND INDICATORS			
Topic	**GRI Description**	**Disclosure**	**Page**
Other social topics			
Digitalization			
103-1 - 103-3	Management approach	Digitalization	40 - 43
Own indicator	Desi index: integration of digital technology	Digitalization > DESI index: integration of digital technology	44
Own indicator	Desi index: Belgian position based on the survey on the contribution of digital technologies to the environmental sustainability actions of EU companies	Digitalization > DESI index: Belgian position based on the survey on the contribution of digital technologies to the environmental sustainability actions of EU companies	44
Mobile society			
103-1 - 103-3	Management approach	Mobile society	46 - 49
Own indicator	Number of member companies that have a mobility plan	Mobile society > Number of member companies that have a mobility plan (monitoring as of 2022)	50
Cooperation			
103-1 - 103-3	Management approach	Cooperation	98 - 99
Own indicator	Number of ecosystems (government, knowledge world, business, citizens) in which Agoria plays an active role	Cooperation > Number of ecosystems (government, knowledge world, business, citizens) in which Agoria plays an active role	100
Own indicator	Number of members entering into partnerships to contribute to the Sustainable Development Goals	Cooperation > Number of members entering into partnerships to contribute to the Sustainable Development Goals	100
Ethics, transparency and cybersecurity			
103-1 - 103-3	Management approach	Ethics, transparency and cybersecurity	104 - 107
Own indicator	Number of members reporting on their sustainability impact and strategy	Ethics, transparency and cybersecurity > Number of members reporting on their sustainability impact and strategy	108
Own indicator	Number of members with a cybersecurity plan	Ethics, transparency and cybersecurity > Number of members with a cybersecurity plan (monitoring as of 2022)	108

Annexes

Stakeholder consultation

Which stakeholders were consulted?

Agoria's main stakeholder groups are:

- governments and policy makers
- civil society (NGOs and consumer associations)
- experts and academics
- socio-economic stakeholders (trade unions)
- partners (suppliers, service providers...)

We determined the stakeholders for the survey on the basis of the material topics that emerged from the exercise with our members. For each material topic, we selected relevant stakeholders. At the 2019 workshop, stakeholders included governments (administration and cabinets), Bond Beter Leefmilieu, the data protection committee on data and privacy, Flanders Circular, trade unions, Unia, Etion, the Vlaamse Instelling voor Technologisch Onderzoek (VITO) [Flemish Institute for Technological Research], go4circle and VDAB.

Most important feedback

The discussions with the stakeholder groups were held in a constructive atmosphere. The feedback from the stakeholders on the selected topics was rather limited. We list the most important remarks:

- **further clustering of impact domains**

After the initial exercise with our members, we were still working on 20 impact domains. The external stakeholders suggested to cluster and focus on them further. We therefore reduced the impact domains to 12.

- **goods transport impact domain**

The stakeholders were also concerned as to whether the impact of goods transport be dealt with under mobility or under the impact of production. In their view, this topic belongs under the impact of production on the environment. **The impact of traffic on the environment and the climate is discussed in Ambition 3: Protect the environment and the planet. we specifically address the impact of commuter traffic and service trips on traffic flow under the impact domain: 'Mobile society.'**

- **social value and downside of the technology industry**

Stakeholders asked that the solutions that the technological industry offers to societal challenges be adequately highlighted. At the same time, they asked to pay attention to the downsides of extensive technological innovation and to highlight the ethical side (of artificial intelligence, for example). We also incorporated this feedback into our strategy.

Content of the report

This sustainability report is the report of the technology industry and reflects the impact of the technology companies in Belgium. The report was drawn up by Agoria, in close cooperation with its members. The material themes were determined with prior stakeholder consultation. All comments from stakeholders were taken into account. This led to the 12 priority impact domains that we report on in this report.

The source and scope of the data are indicated for each indicator. More explanation is included in the section 'Data and data scope'.

The sustainability report has been drawn up in accordance with the standards of the International Global Reporting Initiative (GRI), Core option. No external audit was carried out on the data.

The reporting principles of the GRI were taken into account in preparing the report:

- The report not only describes the positive elements, but also sets out the working points.
- The aggregated data are publicly available or can be requested.
- The indicators are the most relevant ones that companies report on, which increases the comparability of the data. In the next edition of the report, we will further monitor these indicators over time.

Data and data range

The data in this first Sustainability Report are drawn as much as possible from official public datasets. For certain indicators, data from surveys of Agoria members were used. The source is mentioned under each graph.

We report on the entire technology industry in Belgium where. If only figures from Flanders were available, this is clearly indicated in the text or in the source. In this sustainability report, we always report on the most recent available data.

Subdivided into the digital industry, the manufacturing industry and the environmental and energy-intensive industry, the technology is classified under the following codes from the Statistical Classification of Economic Activities in the European Community (NACE):

- C24.4
- C25 to C30
- C61 to C63

Using our own calculations, we selected the appropriate data from datasets containing data on companies from all sectors. We cover 85% of the technology industry with these NACE codes.

Social and economic indicators

The economic and social data come from, inter alia, the National Social Security Office (2021), annual reports of our members (2020), Fedris (2020), Statbel (2021) and The Institute of National Accounts (INR) (2020).

Environmental indicators

For environmental data, we relied on the Planning Bureau (2019), the Belgian Inventory of Greenhouse Gas Emissions-CRF tables (2019), the Public Waste Agency of Flanders (2018), the Flanders Environment Agency (2020), EU-Eurostat (2019) and the European Environment Agency (2019), among others.

Agoria figures

We used data from a survey of our members (2020) for a number of indicators for which no official public datasets are available. In total, we wrote to all of our 2,000 members. We received responses from about 220 members, or 1 in 8. Mostly small companies participated. In addition, we sent an in-depth questionnaire on circular principles to all our members. Ninety-eight companies responded.

Participation in general survey

Size of companies	
-50	118
50-150	46
150-700	35
+700	10
Region of companies	
Flanders	133
Brussels	14
Wallonia	62

Participation in circular survey

Size of companies	
-50	44
50-150	24
150-700	24
+700	6
Region of companies	
Flanders	75
Brussels	5
Wallonia	18

External initiatives and partnerships

External initiatives

Agoria and Sirris are part of various industrial clusters in which companies, government, knowledge institutes and citizens (e.g. students) work together and build expertise around a certain technology or social problem. Agoria and Sirris participate in 8 of the 28 industrial clusters active in Belgium in 2021. These are the Arenberg Science Park (Leuven), Industry 4.0 Science Park (Kortrijk), Thor Park (Genk), The Beacon (Antwerp), BeCentral (Brussels), AGK EGK (Charleroi), Digital Hub (Louvain-la-Neuve) and Sart-Tilman (Liège).

Memberships and remits

The technology industry in Belgium comprises more than 15,000 companies. Each of them has memberships and links with organizations to strengthen each other.

Agoria employees take on a remit in more than 300 companies in total.

About this report

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Bluepoint Brussels
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1030 Brussels
agoria.be

Reporting period

Report publication: 25 May 2022
This is the first sustainability report of the technology industry in Belgium.
Frequency: first report, regular update

Contact details

For questions about this Sustainability Report, please contact:
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GRI compliance

This sustainability report has been drawn up in accordance with the GRI Standards: Core option.

Sustainability strategy, concept, copywriting and report design

Pantarein Publishing

Photography

Agoria; iStock; Adobe Stock; the photos accompanying the cases originate from the companies themselves