

AIPAS General Assembly

Industrial policy and partnerships

EADS - Astrium

Rome, July 23rd 2009

All the space you need



ASTRIUM PROPRIETARY and CONFIDENTIAL

EADS



**Airbus
Airbus Military**



Eurocopter



Astrium



**Defence
& Security**



Space Transportation

European prime contractor on civil and military space transportation and manned space activities.

Satellites

A world leader in design and manufacture of satellite systems.

Services

Satellite services in secure communications, Earth observation and navigation fields.

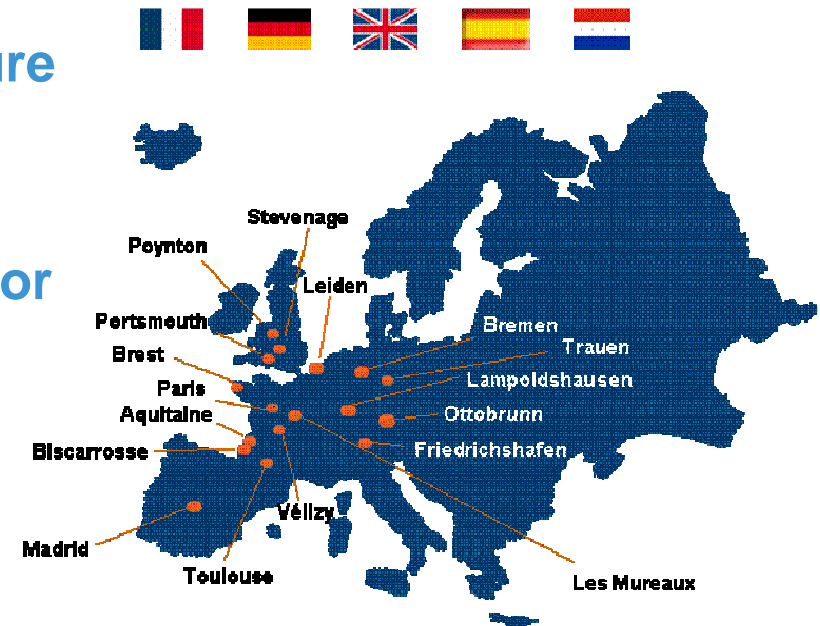
Astrium is a global space company, with expertise and prime contractor ship experience across all sectors of the space business.

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Astrium: A global competitive space company

- N° 3 world space company with >12.000 employees in 5 countries.
- Prime contractor for space transportation, orbital infrastructure and manned space.
- A world leader in the design and manufacture of satellite systems for
 - Earth Observation & Science
 - Navigation
 - Telecom
- Provider of satellite services for secure communications, Earth observation and Navigation.



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Industrial Partnerships with Astrium

- **Motivation for partnerships are**
 - **Widespread and competitive supplier base**
 - **Dual/multiple source policy**
 - **ITAR Free Policy**
 - **Strategic partnerships for dedicated items**

- **Astrium concentrates on partners, who are prepared to accept technical challenges together with us. It means:**
 - **Technical expertise and professional competence**
 - **Creativity for new, innovative approaches**
 - **Risk awareness and cost efficiency**
 - **Reliability, reliability, reliability**

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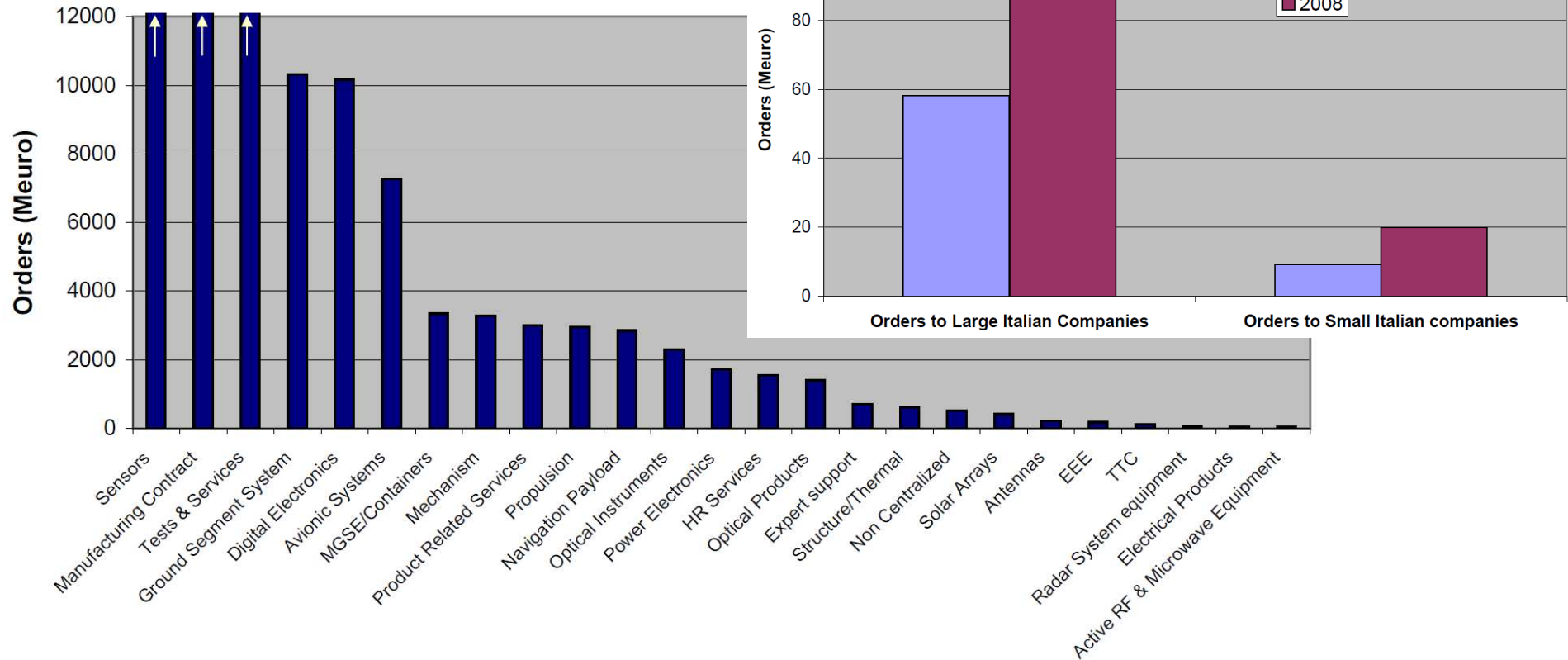
A wide network of partners in Europe

- **Astrium provides 55% of its work share (commercial and institutional) to industrial partners mainly in Europe.**
- **All market segment/ type of activities are involved in this work share:**
 - **Institutional, Commercial & Export markets**
 - Not just a result of geo return constraints
 - **Space Transport, Satellites and all equipment constituents**
 - **Successful partnerships /agreements to develop competitive technologies/products**
 - **R&D contracts in partnership with Labs and universities**
- **Ensure quality and fair decision on any supply:**
 - **“ESA best practices” implemented across all Astrium programmes:**
 - Make or Buy process, Tender evaluation process, Independent Boards, CTO involvement in strategic decisions
 - On ESA programmes where Astrium Equipment Business unit bids: TEB by ESA

Specific situation in Italy

- **With app. 14% share and app. 360M€ Italy is number 3 of the ESA countries. Return coefficients are (status Dec 08):**
 - **Overall: 1,02**
 - **Manned space and exploration: 0,87**
 - **Launcher: 0,97**
 - **Earth Observation: 1,29**
 - **Science: 1,03**
- **Although visibility of industrial landscape has improved by AIPAS, 1.European SME week in May 09, bilateral meetings etc., R&D cooperation with industry and academia is limited e.g.**
 - **Drag free attitude control**
 - **Navigation camera**
 - **Landing demonstrator**
 - **Software development & Modelling**
 - **High throughput On Board Processing**

Procurement in Italy 2008

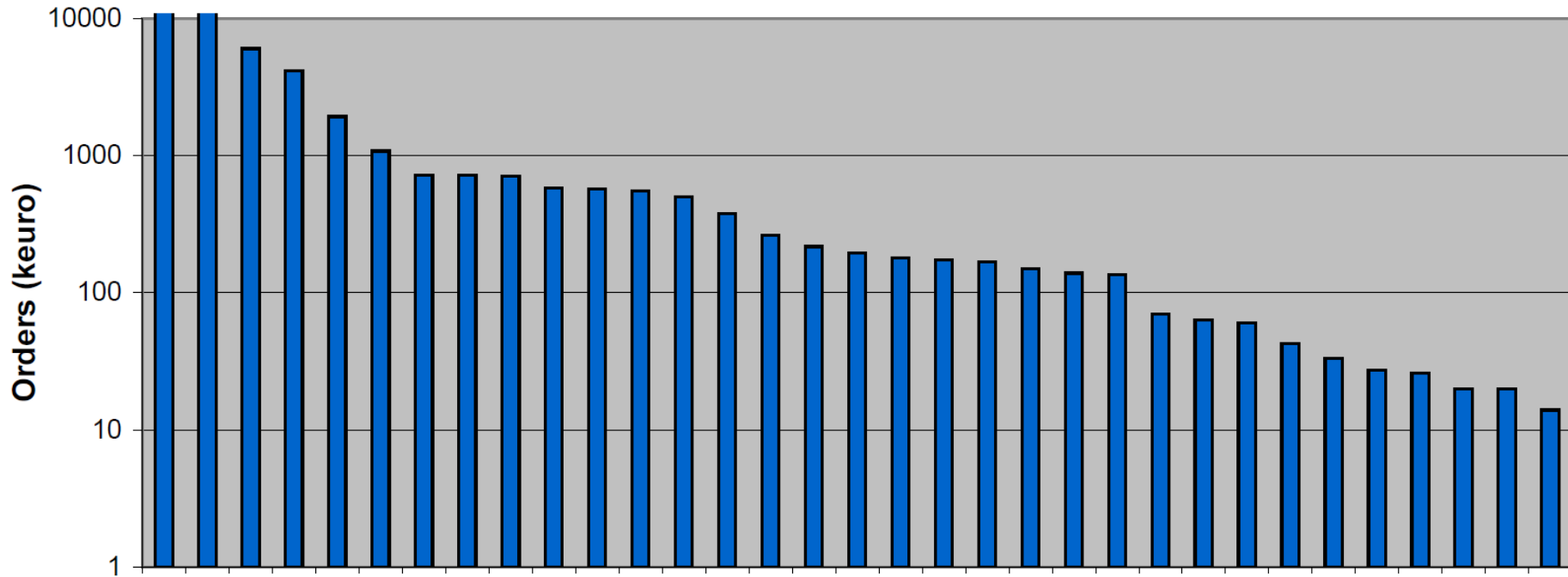


- **Astrium orders to Italian companies have nearly doubled since 2007.**
- **Main business focuses on system and service activities.**
- **SME business has even more than doubled but share is still in the order of 20% of the overall business.**

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Astrium Procurement in Italy per company (2008)



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- In 2008 Astrium has placed orders on more than 30 Italian companies.
- Most of Astrium orders with SMEs have a contract value between 100k€ and 1M€.

2009 ff Wish list and perspectives

- **ASI policy supporting bi- or multi-lateral cooperations between Astrium and Italian SMEs.**
- **Further Improvement of Italian SME's visibility.**
- **Continuation of Equipment Tendering actions for ESA projects like**
 - **Sentinels**
 - **Earth Care**
 - **Exomars**
 - **MTG**
 - **Galileo FOC**
 - **Ariane 5 ME (Midterm Evolution)**
 - **Future Programmes : Exploration, Cosmic Vision, EOEP...**
 - **R&D actions via TRP, GSTP, ARTES...**
- **Continuation of Equipment Tendering actions for Joint projects of ASI and national agencies.**

Conclusion

- **Astrium is highly interested to intensify the cooperation with Italian companies and especially also with SMEs.**
- **Although the cooperation between Astrium and Italian companies has already improved in the last years, there is still room for further strategic partnership:**
 - **Astrium recognizes the excellence of the Italian industry and has long- established experience of working successfully together;**
 - **Astrium acknowledges the strength of the Italian national programme, often complementary to other national ones, and the importance of Italy within ESA;**
 - **Astrium is a full member of the AIPAS and through this cooperation gains an inside knowledge of the Italian SMEs network.**

Points of contact

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