



AeroSpace and Defence  
Industries Association of Europe



# ASD and the Aeroportal Support Action

**Norbert Reich**

Head of Equipment and SME

**EqIMG**

**Poland Meeting**

**Rzeszów, 22-23<sup>rd</sup> of May 2008**



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1. ASD – the Association
2. Supply chain update
3. AeroPortal – EC funded support action



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- 1. ASD – the Association**
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AeroSpace and Defence  
Industries Association of Europe

Represents

**30 Associations**

**20 Countries**

**around €132 billion Turnover**

**over 2000 Companies**

**over 649,000 Employees**





## *As part of our operations, ASD ...*

- Offers a single point of contact and expertise to our partners and stakeholders in the institutions and organizations in Brussels, Europe and worldwide
- Follows and analyzes the legislation that influences the sector
- Generates common industry positions with particular emphasis upon the economic, political, legal, industrial, technical and structural aspects
- Influences the regulation of the sector
- Manages statistics and key figures



## ***ASD Key Priorities 2008***

- 1. Support air transport industry ability to meet environmental targets**
- 2. Within 2008 budget revision, improve EU funding for ASD Industry activities**
- 3. Contribute to 2008 ESA Ministerial Council and promote effective implementation of the European space policy**
- 4. Encourage the implementation of appropriate and robust defence industry, cooperation & market policies at EU level**
- 5. Encourage the implementation of robust security industry & market policies at EU level**
- 6. Promote European contribution to international quality and standards**
- 7. Develop international cooperation**



## ***30 National Associations***

**AAI** – Austrian Aeronautics Industries Group

**ADIG** – Austrian Defence Industry Association

**AFARMADE** – Spanish Association of Manufacturers of Armament, Security & Defence Material

**AFDA** – The Association of Finnish Defence and Aerospace Industries

**AIAD** – Italian Industries Association for Aerospace Systems & Defence

**AIP** – Portuguese Industrial Association

**ALV CR** – Association of Aviation Manufacturers of the Czech Republic

**AOP CR** – Association of the Defence Industry of the Czech Republic

**APAI** – Association of Polish Aviation Industry

**ATECMA** – Spanish Association of Aerospace Industries

**BDI** – Federation of German Industries

**BDIA** – Bulgarian Defence Industry Association

**BDLI** – German Aerospace Industries Association

**BSDI** – Belgian Security & Defence Industry

**CIDEF** – French Defence Industries Association



## ***30 National Associations***

**DANOTEC** – Portuguese Association of Defence Related Industries & New Technologies Companies

**FAD** – Defence & Aerospace Industries Association in Denmark

**FAEI** – Federation of Aerospace Enterprises in Ireland

**FGI** – Federation of Greek Industries

**FSI** – Norwegian Defence and Security Industries Association

**GEBECOMA** – Belgium Aerospace Industries Association

**GIFAS** – French Aerospace Industries Association

**NAI** – Netherlands Aerospace Industries

**NIID** – Netherlands Defence Manufacturers Association

**SAI** – Swedish Aerospace Industries

**SAIG** – Swiss Aeronautical Industries Group

**SOFF** – Swedish Security & Defence Industry

**SaSaD** – Turkish Defence Industry Manufacturers Association

**SBAC** – Society of British Aerospace Companies



# ASD Organisation Chart

**OFFICERS**  
 PRESIDENT: A. Svensson  
 PAST PRESIDENT: C. Edelstenne  
 PRESIDENT ELECT: A. Cook  
 TREASURER: N.V. Barber

**General Assembly**  
 Joint Meeting of the Council and Board

**Council**  
 Presidents of Major Companies

**Board**  
 Officers and Presidents of National Associations/Representatives

COORDINATION GROUP

**François Gayet,**  
 Secretary General

**Riccardo Napolitano,**  
 Director External Affairs  
 Commission,  
 Equipment/SME  
 Commission

**Jean-Pierre Barthélemy,**  
 Director  
 Air Transport,  
 R & T & Operations

**Gert Runde,**  
 Director Security  
 & Defence

**Jean-Jacques Tortora,**  
 Director Space

**Patrick de Prévaux,**  
 Director International  
 Programmes

**EXTERNAL  
 AFFAIRS  
 COMMISSION**

**EQUIPMENT/  
 SME  
 COMMISSION**

**AIR  
 TRANSPORT  
 COMMISSION**

**OPERATIONS  
 COMMISSION**

**R&T  
 COMMISSION**

**SECURITY  
 COMMISSION**

**DEFENCE  
 COMMISSION**

**SPACE  
 COMMISSION**

**Sectoral Groups:**  
 -  
**Committees:**  
 -Data Analysis  
 -Economic & Legal  
**Group:**  
 Industry Mission Group 4

**Sectoral Groups:**  
 Equipment  
 SME  
**Project:**  
 Aeroportal

**Sectoral Groups:**  
 -General Aviation  
 -Rotorcraft  
**Committees:**  
 -Air Traffic Management  
 -Environment  
**Programmes:**  
 -Clean Sky  
 -SESAR  
**Group:**  
 Industry Mission Group 4

**Sectoral Groups:**  
 -AS & MRO  
**Committees:**  
 - Airworthiness  
 - Customer Product Support  
 - SC3  
**Group:**  
 EAQG  
**Affiliated companies:**  
 ASD STAN  
 ASD EASE  
 ASD PRO  
 ASD CERT

**Committees:**  
 -Security R&T  
 -Space R&T  
**Group:**  
 Industry Management Group 4  
**Initiatives:**  
 -ACARE  
 -ESRAB  
 -Space ETP  
**Programmes:**  
 Clean Sky  
 SESAR

**Sectoral Groups:**  
 -Air  
 -Land  
 -Naval  
 -Rotorcraft  
**Committees:**  
 Export Control  
 Economic & Legal  
 R&T Security  
 GMES  
**Project:**  
 STACCATO  
**Independent partner:**  
 EOS

**Sectoral Groups:**  
 -Air  
 -Land  
 -Naval  
 -Rotorcraft  
**Committees:**  
 -Export Control  
 -Economic & Legal  
 -R&T Defence  
 -Space Security & Defence

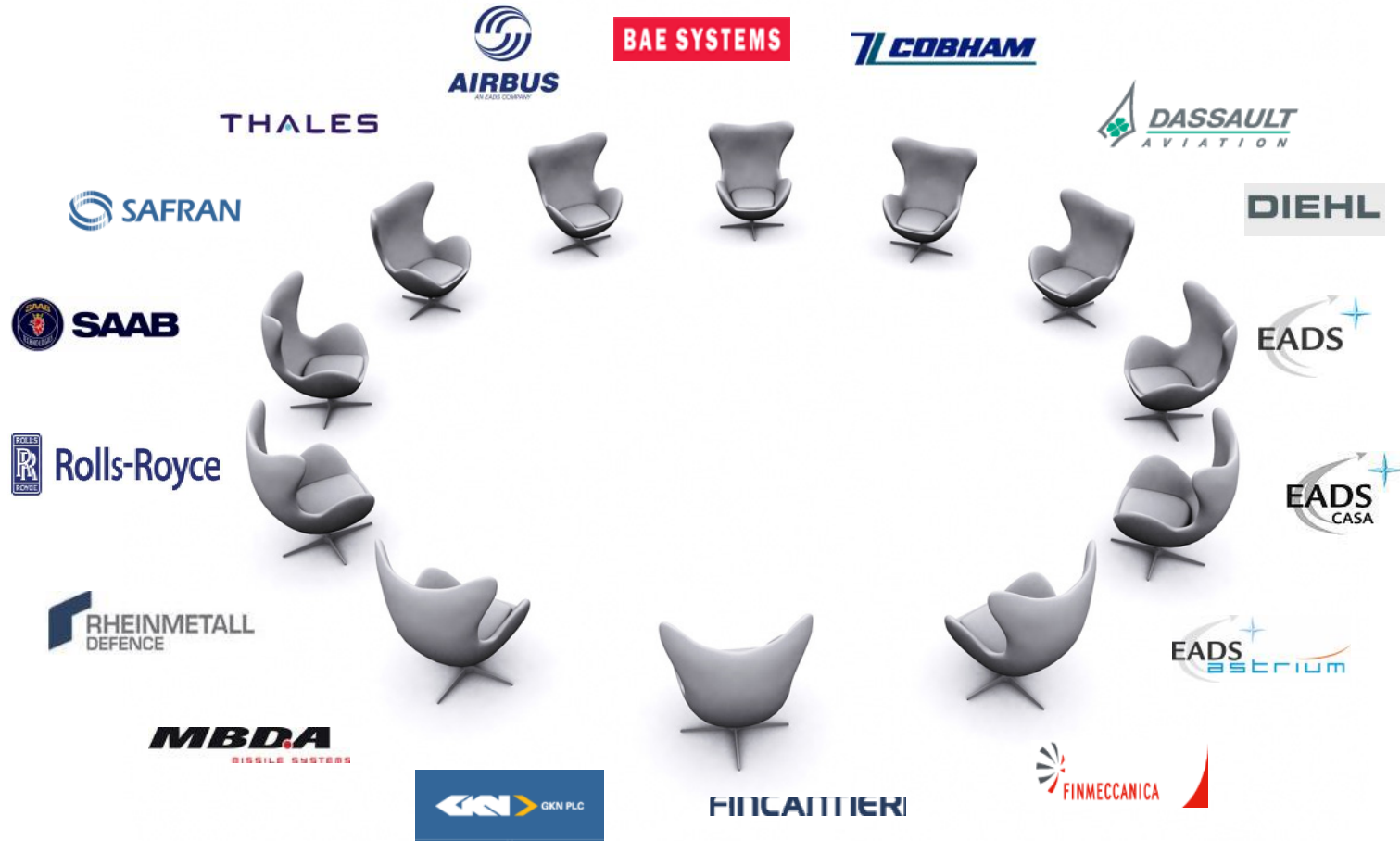
**Sectoral Groups:**  
 -  
**Committees:**  
 •Space Committee on Space Standards  
 •Electronic, Electromechanical Equipment  
 •Global Monitoring for Environment & Security  
 •Legal Affairs  
 •Navigation  
 •R&T  
 •Security & Defence  
 •Space Industry Market

**Committee:**  
 IPPC

No polish SME in the SME Group for the moment



# ASD Council Companies





## *ASD Key Data Aerospace and Defence*

	<b><u>2006</u></b>	<b><u>2007</u></b>	<b>% Change</b>
<b>Turnover* (°):</b>	<b>€125,5 bn</b>	<b>€132,2 bn</b>	<b>+ 5,3</b>
<b>Employment**:</b>	<b>637.800</b>	<b>649.000</b>	<b>+ 1,7</b>

bn = billion

\* = 2006 figures have been revised using the new perimeter 2007 and an improved methodology

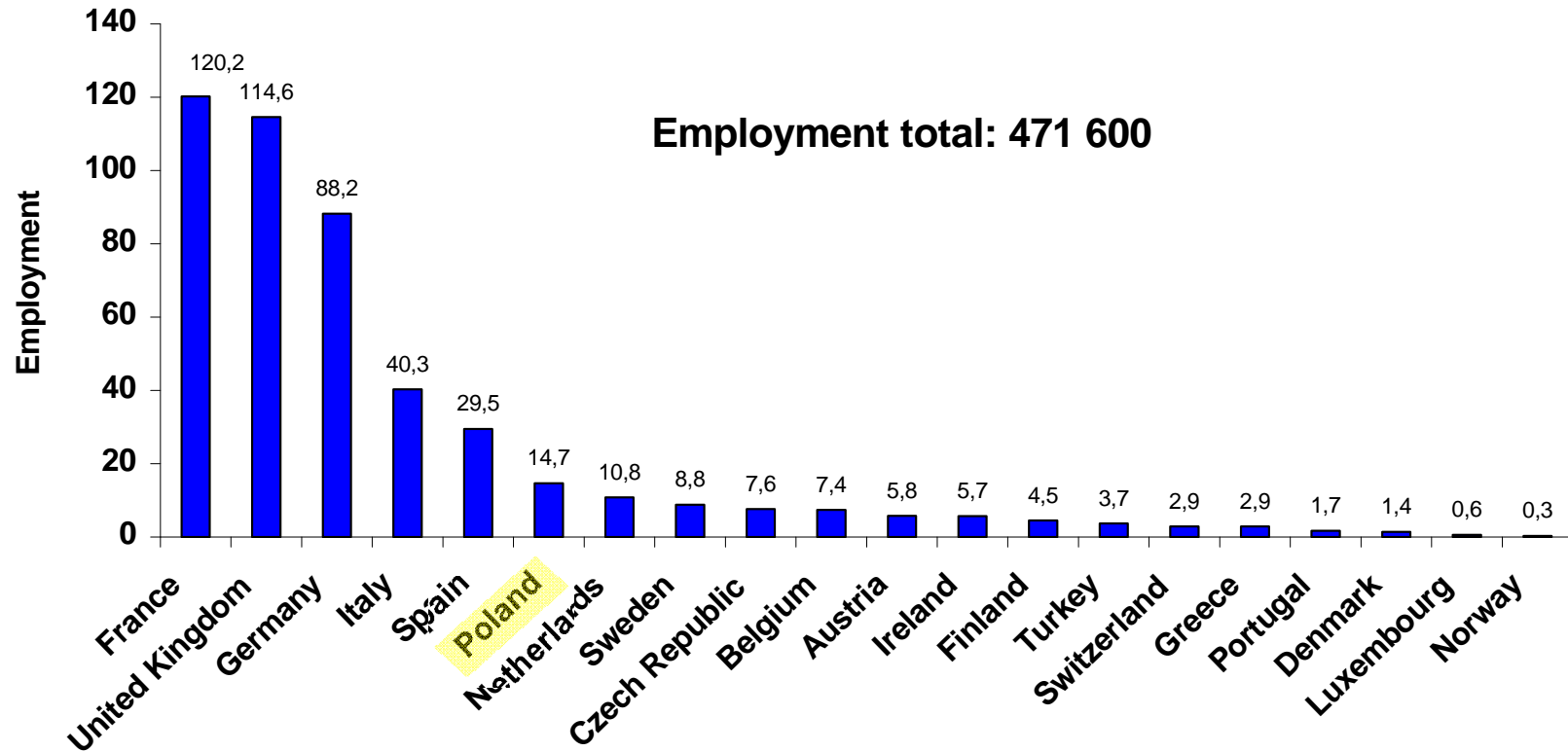
(°) = Unconsolidated Turnover

\*\* = permanent personnel



## National Contributions to Direct EU Aerospace Industry Employment

Number of employees ('000 )



Source: ASD National Associations



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- 2. Supply chain update**
3. AeroPortal supporting action



## ***Drivers for change in European Aerospace Industry***

- Global market and competition
- Currency effects resulting from the weak USD for Euro countries
- Significant reduction of time to market, less time for product developments
- Ongoing increasing demands for quality and in-time delivery
- Full maturity and reliability of products at delivery
- Subprime crisis impacts

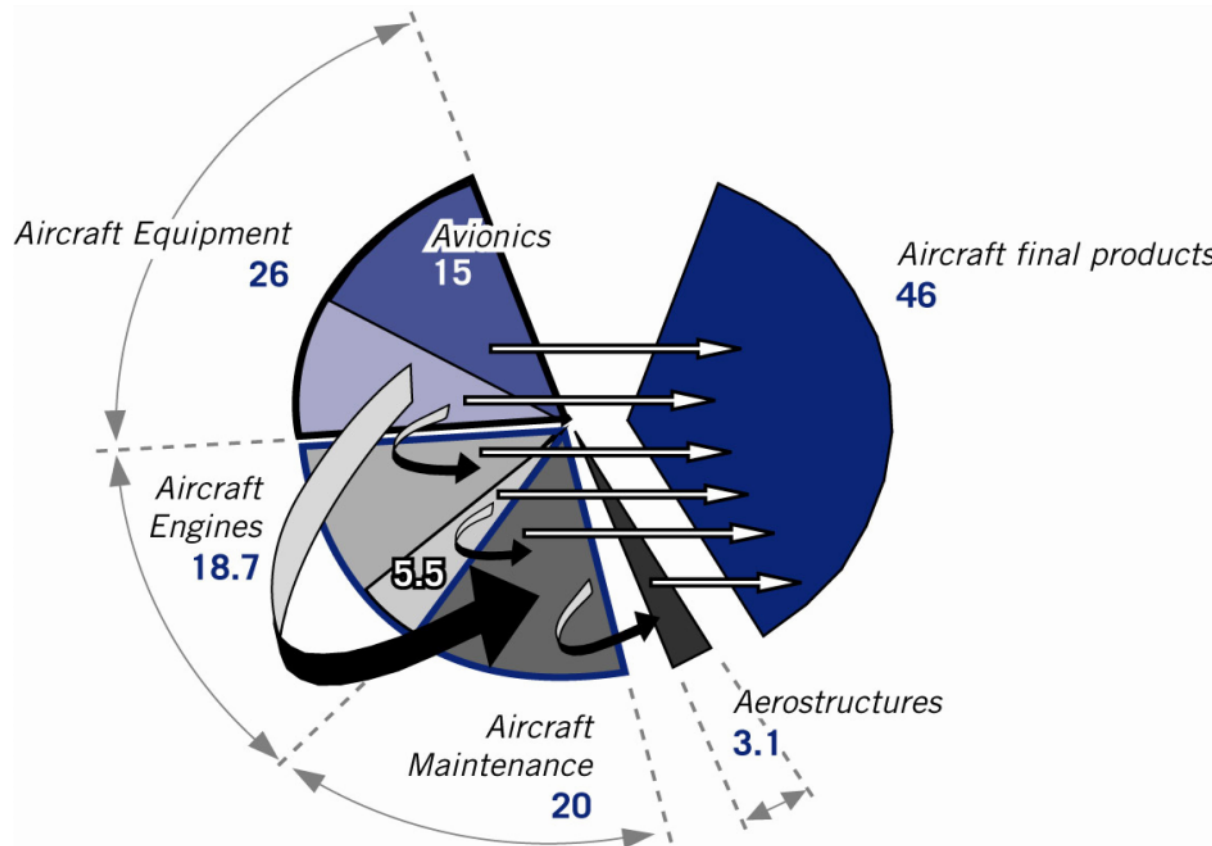


## ***Examples of Supply Chain Change***

- Prime contractors are reducing their first tier supplier bases by in excess of 90%
  - Strategic partnerships with a small number of tier 1 suppliers are set up by primes
- and
- the number of primes and tier 1 Suppliers is reducing through strategic mergers and acquisitions
- Low cost economy suppliers are being developed by most large companies ([The Commission's view of Europe's Aeronautics Industry](#))
  - Financial risk sharing is expected from all suppliers
  - Schedule flexibility is expected to be absorbed at no cost by the supply chain
  - Currency risks are passed on to the suppliers
  - E-Business is increasingly the communication medium



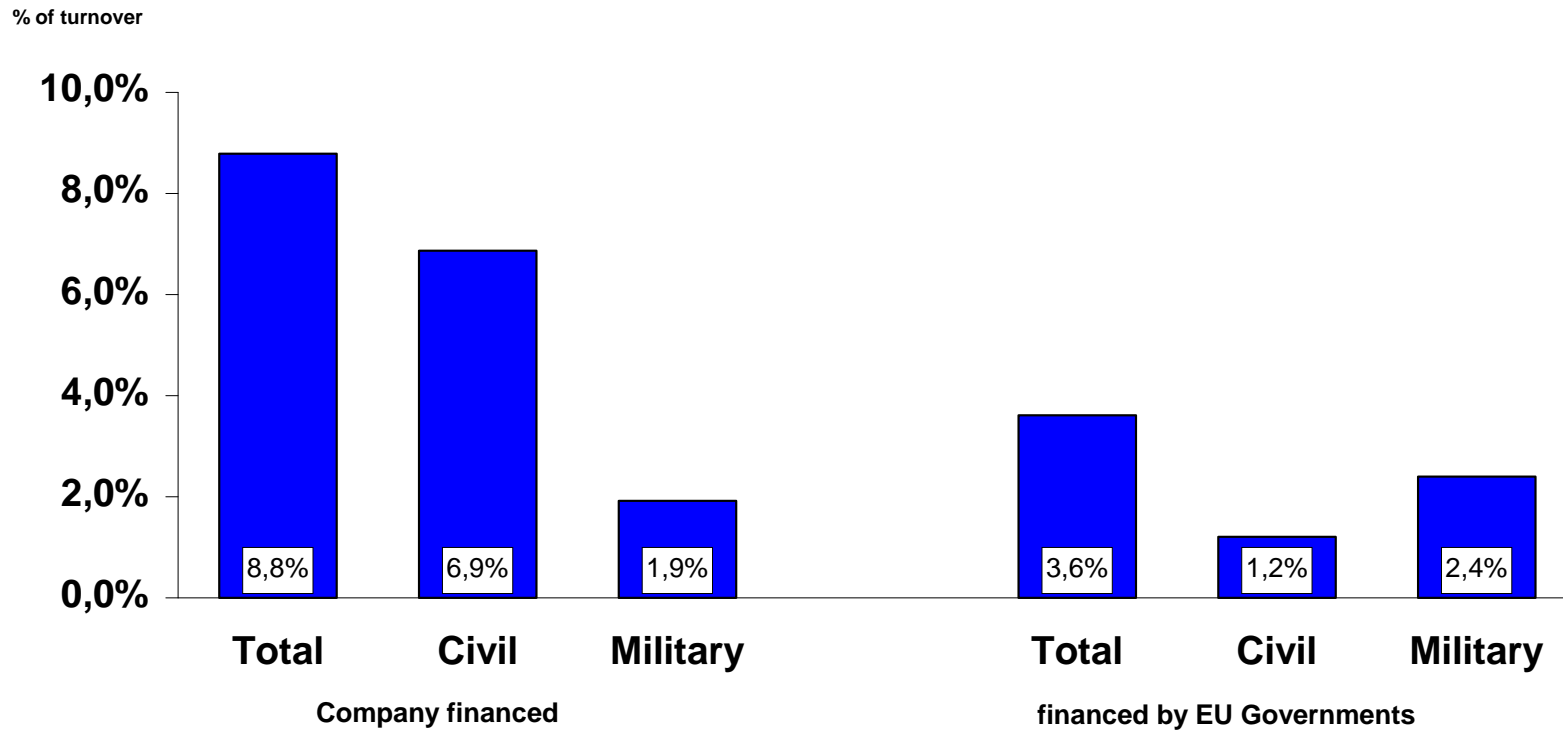
# European Aircraft Industry Turnover by Product Segment flows expressed in bn €





## Source of EU Aeronautic R&D Expenditure

Total RD : 11,7 billion Euro = 12,4% of Turnover\*

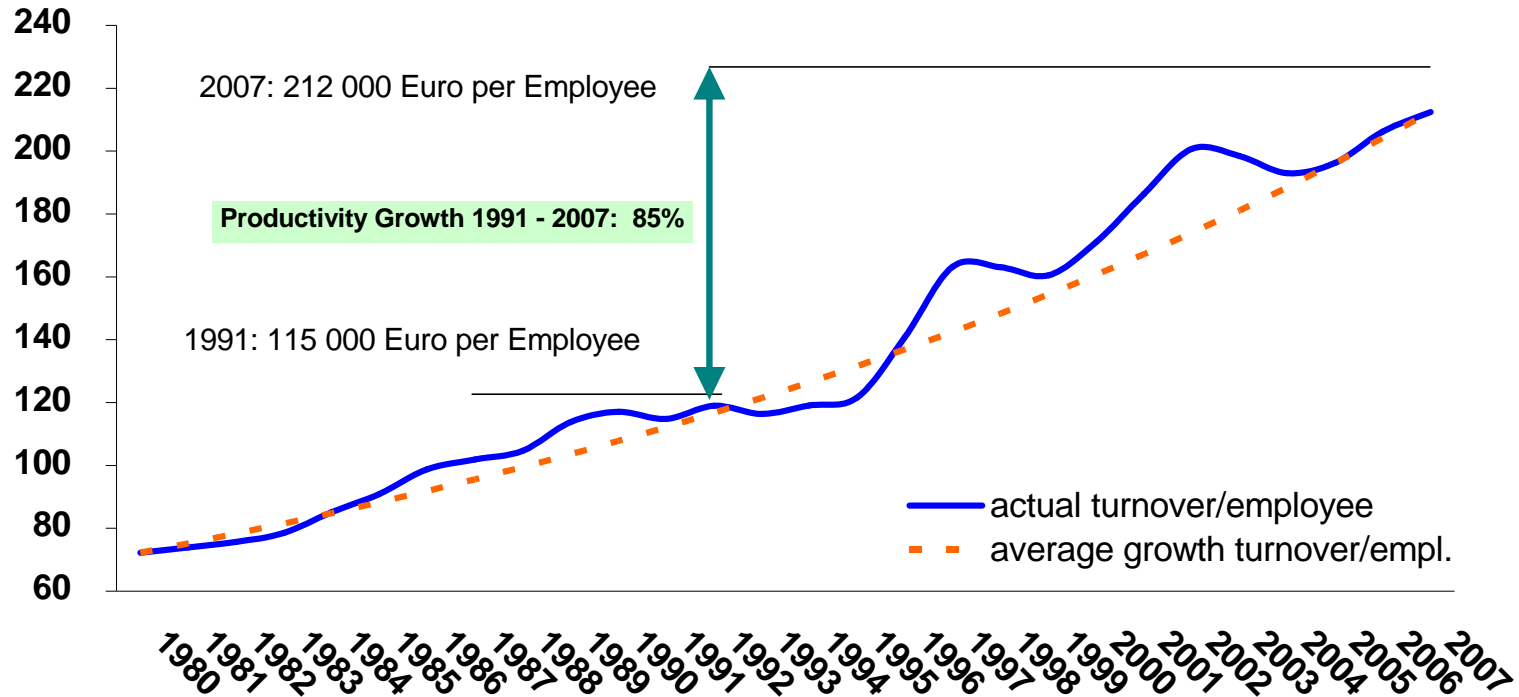


\*) unconsolidated

Source: ASD

## EU Aeronautical labour productivity

Turnover/Employee  
(const. 2007 Euro x 1000)



Source: ASD estimates



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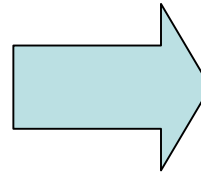
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## The AeroPortal Project



December 2007: with the 1<sup>st</sup> call of FP7 the two former independent supporting activities AeroSME and Scratch, decided to merge, to offer a unique point of contact and improved services for European Aero nautics SMEs





## AeroPortal Project Partners



AEROSPACE AND DEFENCE  
INDUSTRIES ASSOCIATION OF  
EUROPE

paola.chiarini@asd-europe.org



**Belgium**

INNOV SUPPORT

jan\_depauw@innovsupport.net



**Czech Republic**

Tomas BATA University of ZLIN

lapcik@ft.utb.cz



**France**

EURO INTER

contact@eurointer.fr



**Germany**

ALROUND

aeroportal@alround.de



**Greece**

ISTRAM - Institute of Structures &  
Advanced Materials

Patrasistram@hol.gr



**Hungary**

SLOT CONSULTING

rolandguraly@slotconsulting.hu



**Israël**

EURO-CONSULTANTS (2006)

mordecail@eurocons.co.il



**Italy**

CIAOTECH

p.salvatore@ciaotech.it



**Poland**

INSTITUTE of AVIATION

pagowski@ilot.edu.pl



**Portugal**

PEMAS

pema@pema.pt



**Romania**

INCAS – National Institute for  
Aerospace Research

neamtu@incas.ro



**Spain**

CARSA

mromero@carsa.es



## *What to look for in AeroPortal?*



### INFORMATION

- project proposals under preparation in the aerospace sector
- Newsletters: info on funding, events, partner searches, etc.
- Helpdesk
- National/Regional workshops in all FP7 countries
- [www.aeroportal.eu](http://www.aeroportal.eu) (under construction until end 2008),  
[www.aerosme.com](http://www.aerosme.com) , [www.aero-scratch.net](http://www.aero-scratch.net)



## *What to look for in AeroPortal?*



### VISIBILITY

- SME database (approx 1,000 entries)
- Today freely accessible at [www.aerosme.com](http://www.aerosme.com), soon under [www.aeroportal.eu](http://www.aeroportal.eu) with extended performance
- Over 400 visits per month by external users from across Europe
- Perfect to find partners for both research projects and commercial activities
- Register for free on-line at <http://www.aerosme.com/html/pps2.asp>



## ***What does Aeroportal offer? “Awareness and Information”***



- **Entry Point to the Industry provided by ASD and partners**
  - Focal point for and to the Level 2 project co-ordinators
  - Wide contact network across Europe
- **Guide to EU Funded Research at <http://www.aerosme.com/html/fp7m.asp>**
- **Support to SME participation in Level 2 proposals**
  - Issue of Level 2 abstracts on the AeroSME website
  - Organisation of the Brussels workshop and matchmaking (Last took place December 2007, next foreseen mid-2009)
- **Support to SME participation in Industry-led Level 1 proposals**
  - Partner searches on request
  - Free-of-charge individual guidance and consulting
- **Regional Associations and Clusters will be connected through the Aeroportal Multiplier Group**



## ***What does Aeroportal offer? “Practical Support”***



- **Individual audits with SMEs**
  - to better understand their needs in terms of technology acquisition
  - to assess their potential as project leaders or partners
- **Providing free of charge help to SMEs in setting up research proposals up to their submission to the EC evaluation**
- **For information and support contact ASD, the AeroPortal helpdesk or the local AeroPortal partner, which is the Institute for Aviation (Mr. Zbigniew PAGOWSKI)**



## ***Contact details***



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# The Commissions view of Europe's Aeronautics Industry

