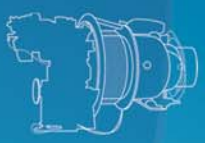
Aerospace Valley

Midi-Pyrenees & Aquitaine



aerospace vallée valley

Welcome
to Aerospace Va

MIDI-PYRENEES & AQUITAINE WORLD CO

Aeronautics, Space, Embedded Systems

EDITO

The call for projects for the competitiveness cluster gave rise, in the Midi-Pyrenees and Aquitaine regions, to an unprecedented mobilisation of all those involved in the sector. Over 600 representatives from the world of aeronautics, space and embedded systems, including numerous SMEs, have taken part in the work that enabled us to submit to the French Government, on February 28 2005, the proposal for the cluster's governance, strategy and federating projects. 40 research projects have received the seal of approval, together with structuring projects such as the Aerospace Campus (grouping of universities and aeronautical engineering schools), the aircraft dismantling centre in Tarbes and the installation in Bordeaux of an INRIA unit concerning information and communication technologies. Designated one of the 6 global clusters in July 2005, the governance is now ready for operation: the permanent structure is in place, supported by State financing, the major regional government structures involved (Aquitaine and Midi-Pyrenees, Bordeaux and Greater Toulouse urban communities), and by the association's founding members. The Cluster's first projects are now launched and supported by the Ministries in charge of Industry, Transport and Defence, the ANR, the territorial communities and by OSEO-ANVAR. We are now optimistic of achieving our objectives: from European leader to the number one aeronautical region in the world by both our industry and our research and education/training potential, and the creation of 40,000 jobs in the sector in the next 20 years.

Jean-Marc THOMAS
President

Pierre-Éric POMMELLET
Vice-President

94,000 industrial jobs

1,200 establishments

10 billion Euros turnover

1/3 of the French aerospace worforce

8,500 researchers

3 of the 4 major aeronautical engineering schools in France

World leader

- civil aircraft of over 100 seats
- luxury business aircraft
- helicopter gas turbines
- landing gears
- remote sensing, data collection and location

European leader

- satellite design, development and integration
- satellite launch and station-keeping
- launchers and propulsion
- satellite telecommunications and space oceanography
- cockpit systems
- atmospheric entry technologies
- military aircraft
- automotive embedded systems

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OMPETITIVENESS CLUSTER

Location of the main establishments

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Aerospace Valley
to prepare the future

Cooperation projects
in 9 core business sectors

- Energy, propulsion systems, engines, environment
- Aero-mechanics, materials and structures
- Air transport safety and security
- Living earth and space
- Navigation, positioning and telecommunications
- Embedded systems
- Architecture and Integration, industrial organisation
- Maintenance, services, training
- Access to space and orbital infrastructures

Structuring projects
in 3 Transverse Activity Domains
Economic development – Research – Education/Training

• The Aerospace Campus in Toulouse

With the grouping on a single site of 3 major French aerospace schools (Supaero, Ensica, Enac) near the universities and other engineering schools, more than 1,000 researchers from the ONERA, EADS CCR, the CNRS and the CNES, and the development of SME infrastructures, the Aerospace Campus will constitute the largest European university campus.

• INRIA Futurs research unit in Bordeaux

Already existing in Bordeaux, the French National Institute for Research in Computer Science and Control has a project to put in place, on the Bordeaux campus, a laboratory to develop research in Information and Communication Science and Technology targeting the needs of the aeronautics, space and embedded systems industries. In the medium term, over 400 people will be working on this Bordeaux site. Project partners: Bordeaux 1 and 2 Universities, ENSEIRB, CNRS.

• The Bordes-Assat aeronautical centre

A 53-hectare site structured around Turbomeca, to develop a world-class aeronautical propulsion centre. The site will accommodate industrial and service activities using common equipment, operator training units and two joint Turbomeca/University Pau & Pays de l'Adour laboratories.

• The aircraft dismantling centre in Tarbes

Currently at the experimental phase (PAMELA project « Process for Advanced Management of End of Life Aircraft »), the centre will be used to recycle gradually up to about 300 civil and military aircraft per year. Project partners: Airbus, Sita (Suez group), EADS Sogerma Services, EADS CCR.

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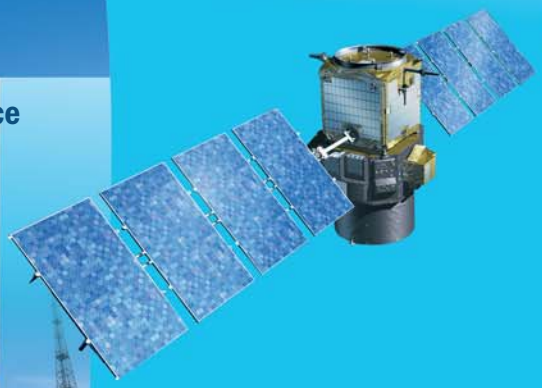
Number 1
l aeronautics

European space
leader serving
humanity



European Number 1
for military aircraft

A first worldwide rank
in business aircraft

A position of excellence
in embedded systems

An internationally recognised
research and training centre

Design and test centres
unique in Europe

The Aerospace Valley association

The Aerospace Valley association was created on July 13 2005, for the national, European and international development of the Midi-Pyrenees & Aquitaine Aeronautics, Space and Embedded Systems Competitiveness Cluster and received the"Global Cluster" seal of approval from the French government on July 12 2005.

It is formed by the companies, research centres, education and training centres and authorities involved in the sector from the two regions.
With its 500 members, the general assembly is composed of 7 electoral colleges (Large manufacturing groups, SMEs/micro-businesses, Education/Training, Research, Economic development Structures, Local and Regional Authorities, Professional organisations and associated partners), the first four of which constitute the Cluster's project evaluation committee.

The mission of the executive committee, constituted of members of the Bureau, the association's Chairman, CBS (Core Business Sector) members, representatives from education/training, research and economic development is to propose the Cluster's general strategy to the Board of Directors and steer its implementation.

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Leaders in aeronautics, space and embedded systems

Aircraft manufacturers

Airbus, Airbus France and Airbus Military
World headquarters
Design Offices,
Final assembly of the Airbus A300, A310, A320, A330, A340 and A380
Design and development of the European military transport A400M

ATR
World leader in the 40 to 70 seat turboprop market (ATR 42 and 72)

Dassault Aviation
World leader in business aircraft (Falcon), manufacture of combat aircraft (Mirage, Rafale)

EADS Socata
European leader in civil and military light aircraft

Space

CNES French space agency - Toulouse
Research and development of space programmes

Alcatel Alenia Space
European Number 1 in space systems and key player in the field of orbital infrastructures

EADS Astrium
One of the world leaders in the design and manufacture of satellite systems

EADS Space Transportation
European specialist in space transport and orbital infrastructures

Zodiac International
World leader in civil aircraft escape slides
Manufacture of stratospheric balloons and satellite super-insulants

Propulsion systems and engines

Microturbo (Safran group)
European leader in low and medium power gas turbines

SME (SNPE Matériaux Énergétiques)
Strategic and space solid propellants, pyrotechnic devices for automotive safety

Snecma Propulsion Solide (Safran group)
Solid rocket motors, European leader in thermostructural composites

Turbomeca (Safran group)
World leader in gas turbines for helicopters

Studies, tests and maintenance

Air France Industries
2nd worldwide for multi-product maintenance

CEA/CESTA
Modelling, design, tests and studies in thermomechanical environment (normal, abnormal), electromagnetic and infrared characterization and tests

DGA – (AIA, CAEPE, CEAT, CELM, CEV, CEVAP)
Test centre and industrial workshops for civil and military aircraft

ONERA
French national aerospace research establishment

Defence

Roxel Propulsion Systems
Tactical and pre-strategic missile propulsion systems

Thales Airborne Systems
Development and integration of airborne defence systems and equipment

Embedded systems

Alstom Transport
European leader in electrical propulsion systems (rail transport)

Freescale Semiconductors
World leader in the design and production of embedded semiconductors

Rockwell Collins France
Aeronautical electronics, telecommunications and radio-navigation systems

Siemens VDO Automotive
World leader in embedded electronics, Headquarters, R&D and test centre, on-board electronics, sensors, engine electronics

Thales Avionics
One of the world leaders in avionics solutions, cockpit electronic systems and equipment

The European No. 1 quality potential in equipment and subcontracting

- **55,000 employees and over 1,000 establishments in full and speciality subcontracting**
- **A network of dynamic SMEs,** working for the major international prime contactors such as the NASA, CNES, Airbus, Boeing, Bombardier, Embraer and Avic
- **All the innovating skills and processes are present:** tooling, maintenance, precision machining, avionics, composites, plastics technology, metal casting, metal working, rapid prototyping, machining, surface treatment, embedded electronics, wiring, hardware, ventilation and cooling systems, cabin furnishings, engineering, design and production, manufacturing and assembly, bonding…

Actielec
Leader in automobile electronic diagnostic, embedded systems on cars and buses and hertzian transmission

Alema
Design and production of aeronautical subassemblies and tools

Creuzet Aéronautique
Complex structural and engine mechanical parts

Exameca
First rank subcontractor specialised in aeronautic piping, metal working, welding

Goodrich Aerospace Europe
European headquarters Construction and assembly of aircraft nacelles

Labinal (Safran group)
Electrical wiring

Latécoère
European No. 2 for civil aircraft structures

Liebherr Aerospace
Headquarters of the Aeronautical Equipment holding. Design and manufacture of onboard pneumatic systems for aircraft and helicopters

Messier-Dowty
World leader in landing gear design and manufacture

Potez Aéronautique
Production of aeronautical subassemblies

Ratier Figeac (Hamilton Sundstrand group)
European No. 1 propeller manufacturer, one of the European leaders in control systems

Saft
World leader in aircraft batteries

A worldwide reference for education/training and research centres

- **8,500** public and private researchers
- **Over 80** specialised, public **research centres**
- **45% of the R&D potential** in the aeronautics, space and embedded systems sectors
- **World-famous research centres:**
  - CEA/CESTA, CNES, CNRM, INRIA, ONERA
  - Numerous laboratories from CNRS, Universities and Major Schools
- **Specialised training,** from the qualified worker to the top engineer
- **3 of the 4 major engineering schools** in France: Supaero, Enac, Ensica
- **13** aerospace **doctoral schools**
- **6 universities and 12 "Grandes Ecoles"** engineering schools providing education and training in the aeronautics, space and embedded systems sectors
- **And soon: the Toulouse Aerospace Campus,** which will group on the same site the main education, research and industry participants, with over 1,000 researchers

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They are members of Aerospace Valley

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TECHNOLOGIES · A+ METROLOGIE · AAAF · ABC · ACE MANAGEMENT · ACOS · ACTIELEC TECHNOLOGIES · AD ÉLECTRONIQUE · ADAIAQ · ADDEO · ADEFIM SUD-OUEST · ADEME · ADERMIP · ADIRAC · ADOUR COMPÉTITIVITÉ · ADRAR FORMATION · ADVAN TEAM & PARTNERS · AEROFONCTIONS SAS · AETS · AFPI SUD-OUEST · AFPI MIDI-PYRÉNÉES · AGATE · AGENCE DE DÉVELOPPEMENT ÉCONOMIQUE DE TARN-ET-GARONNE · AGENIUM TECHNOLOGIES · AIR COST CONTROL · AIR FRANCE · AIR SUPPORT · AIRBUS FRANCE · AIRCELLE · AIROD TECHNOLOGIES SAS · AJILON ENGINEERING · ALCATEL ALENIA SPACE · ALECTRON · ALEMA · ALGO'TECH INFORMATIQUE SA · ALSTOM TRANSPORT · ALTARES · ALTEP · ALTRAN TECHNOLOGIES · AMEC SPIE SUD-OUEST SAS · AMSYCOM · ANTAVIA · ANTONUCCI & ASSOCIES · ANYWARE TECHNOLOGIES · APAVE SUD EUROPE · APSYS · AQUITAINE ÉLECTRONIQUE · AQUITAINE MAÎTRISE D'ŒUVRE · ARCK ÉLECTRONIQUE · ARCK INGÉNIERIE · ARCTIA · AREVA PARAFOUDRES SA · ARIA ÉLECTRONIQUE · ARIÈGE EXPANSION · ARKEMA · ARTAL TECHNOLOGIES · ARTEC AEROSPACE · ASFO · ASSISTANCE AÉRONAUTIQUE & AÉROSPATIALE · ASSYSTEM FRANCE · ASTF SA · ATECA · ATELIERS BIGATA · ATELIERS DE LA HAUTE-GARONNE · ATEQA · ATOUT VEILLE · ATR · AUBERT & DUVAL · AVEYRON EXPANSION · AXEL client.com · AXS ANALYSE DE STRUCTURES · AXS INGÉNIERIE · B2I · BARCOVIEW TEXEN · BEAT · BETA TECH · BGCI · BLANC AERO INDUSTRIES · BOOSTEC · BORDEAUX ÉCOLE DE MANAGEMENT · BORDEAUX TECHNOWEST · BT CONSULTING & SYSTEMS INTEGRATION · BTS INDUSTRIE · BUSINESS CONVENTIONS INTERNATIONAL - 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