

Aeronautics, Space, Embedded Systems

AEROSPACE VALLEY

MIDI-PYRENEES & AQUITAINE

WORLD
COMPETITIVENESS
CLUSTER





World leader

- Commercial airplanes seating over 100 passengers
- High-end general aviation
- Gas turbines for helicopters
- Landing gear
- Remote sensing, data collection and localization

European leader

- Satellite design, development and integration
- Satellite station acquisition and station-keeping
- Rocket launchers and propulsion
- Satellite telecommunications and oceanography from space
- Cockpit systems
- Atmospheric reentry technologies
- Military airplanes
- Embedded systems for automotive applications



This brochure comes at a turning point for the cluster, after three years of operation, and just as we are about to sign a new performance contract with public authorities, along with the strategic roadmap. In mid-2008, a government-ordered audit for all competitiveness clusters confirmed Aerospace Valley as a "world competitiveness cluster". We are of course pleased with the results (224 R&D projects certified or receiving seals of approval, representing an investment of €450 million, including €200 million in public aid, 41 pivotal projects), but more than that we are pleased to see that this new entity, Aerospace Valley, is above all, an adventure involving men and women who believe in the effectiveness of the golden triangle of innovation - industry/research/training. I applaud this new collective effort which has given us a solid project for the next three years. The 136-page road map follows government recommendations. And although we have already been working in that direction, the government wanted the clusters to integrate all of the components necessary to consolidate innovations both in terms of performance and market penetration, and to support their sources, particularly the SMEs. The roadmap covers the attraction of competencies, management of human resources, partnerships between clusters and the program of actions of the cluster's ecosystem, as well as plans for action in strategic and transversal sectors, evaluated via balanced scorecards. We know where we're going and how we will get there. As David M. Ogilvy said, *Encourage innovation. Change is our lifeblood, stagnation our death knell.* We are counting on you.

Jean-Marc Thomas
President

Jean-Michel Estrade
Vice-President

EDITORIAL

AEROSPACE VALLEY TO PREPARE THE FUTURE



Cooperative projects in nine strategic business sectors

- Energy, Engines, Propulsion Systems and Access to Space
- General Engineering and Collaborative Automated Production
- Embedded Systems
- Maintenance and Services
- Aero-Mechanics, Materials and Structures
- Living Earth and Space
- Autonomous Aeronautics and Space Systems
- Air Transport Safety and Security
- Navigation, Positioning and Telecommunications

Pivotal projects in three transversal fields

- Economic and Industrial Development
- Research
- Jobs & Skills Needs Analysis



A global reputation in research and education...

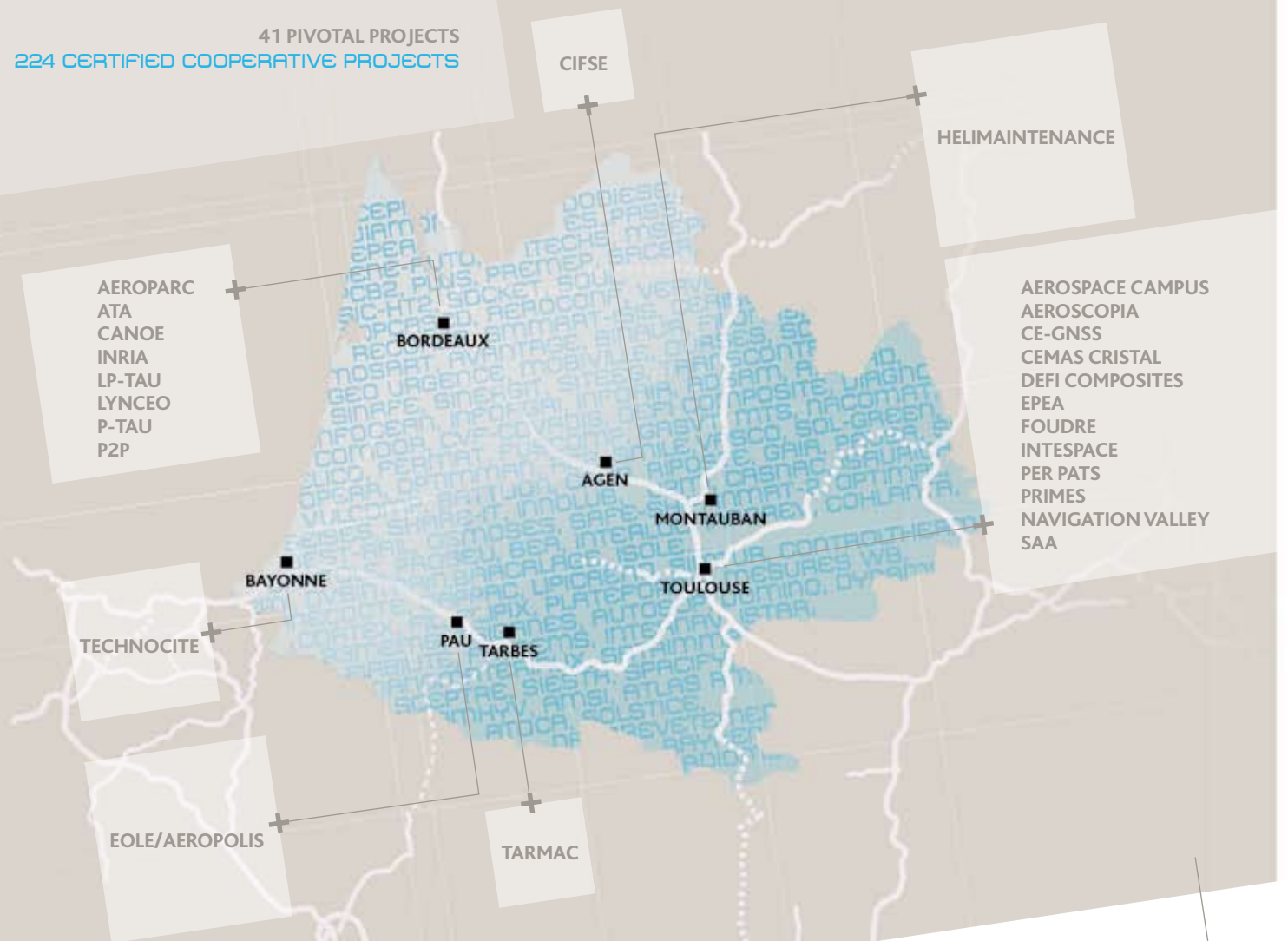
- Internationally recognized higher education: 2 of France's prestigious aerospace engineering schools: ENAC, ISAE
- Numerous specialized training programs, ranging from secondary through master's and doctoral programs (13 doctoral programs in aeronautics and space) and engineering diplomas (12 engineering school programs, 6 advanced university programs)
- Over 80 specialized public research centers
- 45% of the R&D jobs in aeronautics, space and embedded systems
- Renowned research centers and institutes, centers for technology transfer and pertinent expertise, including Arkema, CEA/CESTA, CERFACS, CNES, CNRM, CNRS, EMAC, Institut Clément Ader, IMS, INRIA, INP, INSA, Institut Carnot MIB, IdC, ICMCB, IFTS, IRIT, LAAS, LaBRI, LAMEFIP, LCPO, LCTS, LPCML, LPCP, LIUPPA, LMP, ONERA, PEARL 2, RIS, Rhodia, RTRA Sciences et Technologies pour l'Aéronautique et l'Espace, Stockage de l'Énergie Électrique, TECHNACOL, TéSA, TREFLE, etc.

Aerospace Valley covers the full range of initial and continued education programs for professions related to aeronautics, space and embedded systems, and participates in the creation of new training modules directly linked to industry needs.



A land of innovation

41 PIVOTAL PROJECTS
224 CERTIFIED COOPERATIVE PROJECTS



OTHER PIVOTAL PROJECTS:

Incubator projects:
NEOSTAR

Assistance to SMEs:
ADER, AEROTEC

Economic intelligence:
INTELLIMIP

Continued education:
CLUSTERA, Interactive catalog...

National projects:
BOOSTAEROSPACE, PRODIGE, OPEES

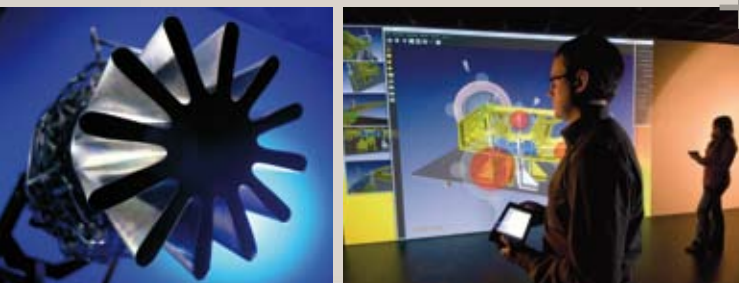
THE AEROSPACE VALLEY ASSOCIATION

The Aerospace Valley Association was created on July 13, 2005 to promote international development of the Aeronautics, Space and Embedded Systems Competitiveness Cluster in Midi-Pyrenees & Aquitaine, which received its seal of approval as a world competitiveness cluster from the French government on July 12, 2005.

The association is made up of companies, research centers, training centers and institutes of higher education, involved in these sectors in both the Midi-Pyrenees and Aquitaine regions.

In 2008, the association had 538 members, including 255 SMEs. The General Assembly is made up of seven collegial boards (large corporations, SMEs, training centers, research centers, economic development organizations, local government authorities, professional organizations and associated partners), with the first four making up the cluster's project certification committee.

The purpose of the executive committee – composed of board members, the association's operational management representatives, strategic business sector and transversal field managers, representatives from training, research and economic development organizations – is to present a general strategy for the cluster to the board of directors and to manage its implementation.



AEROSPACE VALLEY LEADERS



Aeronautics

Airbus, Airbus France & Airbus Military

World headquarters
Design offices, final assembly of the Airbus A320, A330, A340 and A380
Design and development of the A400M military transport and the A350

Air France Industries

The world's second-largest multi-product MRO provider

ATR

World headquarters
World leader in 50-74-seat turboprop airplanes (ATR 42 and 72)

Daher-Socata

A world leader in light aircraft for civilian and military markets

Dassault Aviation

World leader in business aviation (Falcon), manufacturer of fighter planes (Mirage, Rafale)

EADS Sogerma

1st tier supplier of airframes for regional airplanes (ATR)

Goodrich Aerospace Europe

European headquarters
A world leader in systems and services for power plant integration

Latécoère

A world leader in airframes, wiring and embedded systems, engineering and services

Liebherr Aerospace Toulouse

Holding company headquarters
A world leader in aircraft air systems



Messier-Dowty (Safran group)

World leader in landing gear design, manufacture and customer support

Microturbo (Safran group)

European leader in compact gas turbines

Ratier Figeac

(UTC, Hamilton Sundstrand group)
A European leader in propellers, cockpit, and actuator equipment

Sabena Technics

A major aviation MRO provider

Saft

World leader in Ni-Cd, Ni-MH and Li-ion batteries for civil and military aviation

Turbomeca (Safran group)

World leader in gas turbines for helicopters

Space

CNES, French Space Agency, Toulouse Center

Implementation of France's space strategy



EADS Astrium Aquitaine

European specialist in rocket launchers and orbital infrastructures

EADS Astrium Toulouse

A world leader in the design and manufacture of satellites and space systems

Météo France

Central meteorology operations department, Ecole Nationale de la Météorologie (meteorology school), Centre National de Recherche de Météo France (research center)

Snecma Propulsion Solide

(Safran group)
European leader in solid rocket fuel for ballistic missiles and space launchers
Technical excellence center for thermo-structural composites

SNPE Matériaux Énergétiques

Solid rocket fuel for space and strategic applications

Thales Alenia Space

A world leader in design and manufacture of satellites and space systems

Embedded Systems

ACTIA Group

International group specialized in automotive electronics and telecommunications

Alstom Transport

Center of excellence for railway power modules, equipment and drive-trains

Continental

One of the world's leading automotive equipment makers, development and manufacture of innovative products and systems

Freescale Semiconductors

Major supplier of embedded semiconductors

Honeywell Aerospace

Maintenance of avionics equipment, and aircraft onboard systems

Rockwell Collins France

French headquarters
Electronic products and systems for aeronautics, defense and IT networks

Thales Aeronautics Division

A world leader in avionics solutions, cockpit equipment and electronic systems



Testing

CEA/CESTA

Specialized in thermal mechanics, aerodynamics, electromagnetism, and simulation of complex systems, site of the Laser Mégajoule

Ministry of Defense

(AIA, CAEPE, CEAT, CELM, CEV, CEVAP)
Test centers and industrial plants for civil and military aviation

ONERA

Leading French center for aeronautics and space studies, research and testing



Europe's leading qualitative offer of equipment, design and subcontracting

2MoRO

Consulting for information systems organization in aeronautics and defense

Aérofuctions

Composite structural parts, equipment integration

Aéro Team group

(Asquini, Couso, Gentilin, Sofop)
Precision mechanical engineering, tooling and subassemblies



Aquitaine Electronique

Design, development, manufacture and integration of civil and military aeronautics applications



ASTF (ALCEN group)

Mechanical, avionics, sheet-metal, airframe subassemblies

Aubert & Duval

(Fortech Airforge group)
Forge work, stamping, die stamping, metalwork for aeronautics

Boostec Industries

Developer and manufacturer of high-performance ceramic products

Creuzet Aéronautique

Complex mechanical parts for airframes and engine components

EADS Composites Aquitaine

Composite structural parts

Epsilon Ingénierie

European leader in thermal engineering

Equip'Aero

Systems equipment manufacturer, mechanical parts and assemblies, maintenance



Esterel Technologies

World leader in tools for development and verification of critical embedded systems

Exameca

Mechanically welded subassemblies



FEDD

Manufacture of complete electronic boards and assemblies

Figeac Aero

Milling and assembly of aeronautical parts

Forest-Liné

Manufacture and installation of large industrial production systems



Ingeliance group (Altep,

AXS Analyse de structures, Interface)

Engineering of products and systems, projects and processes, documentary and communication engineering, technical and methodological evaluation

Lauac

Leading European subcontractor for subassemblies and airframes

L'Électrolyse

Surface treatment and coatings

Magellium

Imaging, robotics, geomatics and satellite navigation applications, observation satellite ground segments, systems architecture

Maz'Air

Development and manufacture of work packages and aeronautics products

Mecahers

Design and manufacture of mechanical and composite parts and subassemblies, maintenance of cabin components

Micro Mécanique

Pyrénéenne (MMP)

Development, production and tests of complex hydraulic assemblies

Navocap

Embedded equipment, integrating localization and radio communications technologies

Potez Aéronautique

Airframe assemblies and structures for civil and military aviation, structural repairs

Serma Ingénierie

Embedded electronic systems

Technofan (Safran group)

World leader in low-pressure ventilation systems and equipment



AEROSPACE VALLEY ANTICIPATES TECHNOLOGICAL EVOLUTIONS BY MASTERING KEY TECHNOLOGIES:

- High-performance composite materials
- Systems and flight controls for manned aircraft, satellites and UAVs
- Combustion
- Electrical or hybrid energy storage and management
- Supply-chain and concurrent engineering
- Technical data exchanges
- Remote maintenance
- Safety and dependability
- Operational security
- Environmental ruggedness
- Real-time software
- Integrated architectures
- Human/system interfaces and cognitive science
- Scientific calculations
- Micro and nanotechnologies
- Embedded systems

Design offices, engineering, IT

All of the major players are present in the Aerospace Valley regions, including Aeroconseil, Ajilon Ingénierie, Akka Technologies, Altran Technologies, Assystem, Atos Origin Intégration, Cap Gemini, Cimpa, CS Communication et Systèmes, ECM, Eurogiciel, GFI, ISIS MPP, Segula Aerospace, Sogclair, Spie Sud-Ouest, Steria, Teuchos, etc.

Aerospace Valley brings together the major players in engineering and consulting in a range of sectors including technical sciences, program management systems, industrial engineering and production. With offers organized around leading programs in aeronautics and space, these industries participate in product design, industrialization and logistical support.

AEROSPACE valley members

@LTIMER • 2 MoRO • 2ADI • 3D CONTECH • A+ MÉTROLOGIE • AAAF • ABLE IN EUROPE • ABOARD ENGINEERING • ABYLSER • ACE MANAGEMENT • ACOS SAS • ACTEQ • ACTIA GROUP • ADDEO • ADEFIM SUD-OUEST • ADENEO • ADOUR COMPÉTITIVITÉ • ADRAR FORMATION • ADVAN TEAM & PARTNERS • AEROART • AEROCONSEIL • AERODRONES • AEROFONCTIONS SAS • AEROSOFT • AFPI SUD-OUEST • AFPI MIDI-PYRÉNÉES • AGATE • AGENCE DE DÉVELOPPEMENT ÉCONOMIQUE DE TARN-ET-GARONNE • AIR COST CONTROL • AIR FORMATION • AIR FRANCE • AIR SUPPORT • AIRBUS FRANCE • AIRCELLE • AIROD TECHNOLOGIES • AJILON ENGINEERING • AKKA INFORMATIQUE & SYSTÈMES SUD • ALCIMED • ALGO TECH INFORMATIQUE • ALPHA MOS • ALSTOM TRANSPORT • ALTEN SUD-OUEST • ALTEP • ALTRAM TECHNOLOGIES • ALYOTECH • AMETRA • AMPERE • AMSYCOM • AMTV • ANTAVIA • ANYWARE TECHNOLOGIES • APSIDE • APSYS • APX SYNSTAR • AQUITAINE ÉLECTRONIQUE • AQUITAINE MAÎTRISE D'ŒUVRE • ARCALE • ARCK ÉLECTRONIQUE • ARE TECHNOLOGIES • AREVA TA • ARIA ÉLECTRONIQUE • ARIÈGE EXPANSION • ARKEMA FRANCE • ARTAL TECHNOLOGIES • ARTS ET MÉTIERS PARISTECH • ASQUINI MGP • ASSISTANCE AÉRONAUTIQUE & AÉROSPATIALE • ASSYSTEM FRANCE • ASTEK SUD-OUEST • ASTF • ASTRIUM • AT2D • ATECA • ATELIERS BIGATA • ATELIERS DE LA HAUTE-GARONNE • ATEQ MICRON • ATMOSPHERE • ATOS CONSULTING • ATOS ORIGIN • ATR • AUBERT & DUVAL • AUROCK • AURORA ARKA • AVEYRON EXPANSION • AXESS EUROPE • AXS ANALYSE DE STRUCTURES • BETA TECH • BLUE GREEN TECHNOLOGY • BNAE • BODYCOTE TESTING GROUP • BOOSTEC • BORDEAUX TECHNOWEST • BREVALEX • BT FRANCE • BTS INDUSTRIE • BUGBUSTERS SAS • BUREAU VERITAS • BCI • C2 CONSULTANT • CABINET BARRE LAFFORGUE • CABINET SANTARELLI • CAP GEMINI SUD • CAPITAL HIGH TECH • CAPLASER INFORMATIQUE • CASTEL & FROMAGET • CAUQUIL • CAZENAVE • CEA CESTA • CEBENETWORK • CERFACS • CESI • CETIM • CFAI-IP • CGx AERO in SYS • CHABRILLAC • CHAMBRE DE COMMERCE ET D'INDUSTRIE DE BORDEAUX • CHAMBRE DE COMMERCE ET D'INDUSTRIE DE BAYONNE PAYS BASQUE • CHAMBRE DE COMMERCE ET D'INDUSTRIE DE L'ARIÈGE • CHAMBRE DE COMMERCE ET D'INDUSTRIE DE MONTAUBAN ET DE TARN-ET-GARONNE • CHAMBRE DE COMMERCE ET D'INDUSTRIE DE TARDES ET DES HAUTES-PYRÉNÉES • CHAMBRE DE COMMERCE ET D'INDUSTRIE DE TOULOUSE • CHAMBRE DE COMMERCE ET D'INDUSTRIE DU GERS • CHAMBRE DE COMMERCE ET D'INDUSTRIE DU LOT • CHAMBRE DE COMMERCE ET D'INDUSTRIE PAU-BÉARN • CHAMBRE RÉGIONALE DE COMMERCE ET D'INDUSTRIE AQUITAINE • CHAMBRE RÉGIONALE DE COMMERCE ET D'INDUSTRIE DE MIDI-PYRÉNÉES • CIMPA • CIREP • CITE DE L'ESPACE • CLEMESSEY • CLS • CLUB D'ENTREPRISES DE COLOMIERS • CLUB GALAXIE • CMT+ • CNES • CNRS/ICMCB • COFIDUR ÉLECTRONIQUE • COMITÉ DÉPARTEMENTAL DE DÉVELOPPEMENT ÉCONOMIQUE DE TARDES • COMMUNAUTÉ D'AGGLOMÉRATION DU MARSAN • COMMUNAUTÉ D'AGGLOMÉRATION DE BAYONNE-ANGLET-BIARRITZ • COMMUNAUTÉ D'AGGLOMÉRATION PAU-PYRÉNÉES • COMMUNAUTÉ D'AGGLOMÉRATION DU GRAND RODEZ • COMMUNAUTÉ DE MONTAUBAN TROIS RIVIÈRES • COMMUNAUTÉ URBAINE DE BORDEAUX • CONSEIL ÉCONOMIQUE ET SOCIAL RÉGIONAL DE MIDI-PYRÉNÉES • CONSEIL GÉNÉRAL DE LA GIRONDE • CONSEIL GÉNÉRAL DE L'ARIÈGE • CONSEIL GÉNÉRAL DE L'AVEYRON • CONSEIL GÉNÉRAL DE LOT-ET-GARONNE • CONSEIL GÉNÉRAL DE TARN-ET-GARONNE • CONSEIL GÉNÉRAL DES HAUTES-PYRÉNÉES • CONSEIL GÉNÉRAL DES LANDES • CONSEIL GÉNÉRAL DU GERS • CONSEIL GÉNÉRAL DU LOT • CONSEIL GÉNÉRAL DU TARN • CONSEIL GÉNÉRAL PYRÉNÉES-ATLANTIQUES • CONSEIL RÉGIONAL AQUITAINE • CONSEIL RÉGIONAL DE POITOU-CHARENTES • CONSEIL RÉGIONAL MIDI-PYRÉNÉES • CONSTRUCTION STRUCTURES AÉRONAUTIQUES • CONTINENTAL AUTOMOTIVE FRANCE SAS • CRÉDIT COOPÉRATIF • CREUZET AÉRONAUTIQUE • CRISTIN ÉLECTRO ÉROSION • CRITT MÉCANIQUE ET COMPOSITES • CRITT TECHNACOL • CS SYSTÈMES D'INFORMATION • CSI SUD-OUEST • CTEI • CYBEL • DAHER-SOCATA • DASSAULT AVIATION • DATUS SUD-OUEST • DEFI 12 • DELTA TECHNOLOGIES • DELTY • DHL • DIGITAL PRODUCT SIMULATION • DIRI-GENT CONSULTING GROUP • DISTRIBUTION SERVICES INDUSTRIELS • DRILLSTAR INDUSTRIES • EBA • EADS ASTRIUM AQUITAINE • EADS ASTRIUM TOULOUSE • EADS COMPOSITE AQUITAINE • EADS FRANCE (Innovation Works Dept.) • EADS SOGERMA • ECA SINTERS • ECM • ÉCOLE DES MINES D'ALBI-CARMAUX • EDF ENTREPRISES SUD-OUEST • EGIS AVIA • EHMES • ELTA • ELYO MIDI OCEAN • EMCI • EMOVEO • ENAC • ENIT • ENSCPB • ENSEIRB • ENSMA • ENVOI • EPSILON COMPOSITE • EPSILON INGÉNIERIE • EQUIP AERO INDUSTRIE • EREMS • ERNST & YOUNG POLE SUD-OUEST • SOCIÉTÉ D'AVOCATS • ESC TOULOUSE • ESEU • ESTEREL TECHNOLOGIES • ESTIA • EXOGICIEL • EUROPEAN ACADEMY FOR AVIATION SAFETY • EUROSAFE • EXAMECA AÉRONAUTIQUE • EXCENT • FEDD • FERCHAU ENGINEERING SARL • FLY-N-SENSE • FONDERIE MERCIÉ EUROPE • FONDERIE MESSIER • FOREST LINE • FORMULATION • FRANCE TÉLÉCOM DIRECTION RÉGIONALE DE TOULOUSE • FREESCALE SEMICONDUCTOR FRANCE SA • GCG • G2D SARL • GACHES CHIMIE • GDTECH FRANCE SAS • GEENSYS • GENTILIN SA • GEOLOCYSYSTEMS • GERAC • GFI • GIFAS • GIP MERCATOR OCEAN • GIPI • GLENAIR • GOODRICH AEROSPACE EUROPE • GRAND TOULOUSE COMMUNAUTÉ URBAINE • GROUPE ELYSSOM • GROUPE LAUAK AÉRONAUTIQUE INDUSTRIE • GROUPEMENT CECILE • GUYANE TECHNOPOLE • HARTCHROM AERONAUTIQUES FRANCE • HÉLILEO • HIMA360 • HONEYWELL AEROSPACE • HPC-SA • HSBG FRANCE • HUGUET INGÉNIERIE • I2S LAND OF VISION • IAS • IBM SUD-OUEST • ICAM • ICOGNITIVIE EUROPE • ICOM COMMUNICATION • IFTS • IGE-XAO GROUP • IGN • IMMERSION SAS • INCUBATEUR MIDI-PYRÉNÉES • INEUM CONSULTING • INFOTERRA • INGELIANCE • INLINGUA • INNOVALIS AQUITAINE • INPT • INRIA • INSA • INSITU FINANCE • INSTITUT CARNOT MIB • INSTITUT DE COGNITIQUE • INSTITUT POLYTECHNIQUE DES SCIENCES AVANCÉES • IPSA • INTEGRAL SYSTEMS EUROPE • INTESPACE • INTULIB • IOSIS SUD-OUEST • IRDI GIE • ISAE • ISI MIDI-PYRÉNÉES • ISIS-MPP • ISIT • ISP SYSTEM • ITII • IUT1 DE GRADIGNAN • IXAIRCO • HELIMAINTEANCE • JEDO TECHNOLOGIES • JPR CAP • JTT COMPOSITE • KPMG • LA MÉCANIQUE • LA MELEE NUMERIQUE • LABINAL • LACROIX DEFENCE & SECURITY • LAROCHE INDUSTRIES • LASELEC SA • LATECIS • LATECOERE • LATELEC • LE CHALLENGE DES LANGUES • LE GRAND TARDES • L'ÉLECTROLYSE • LGM • LIEBHERR AEROSPACE TOULOUSE • LIEGES HPK • LINGUISTIQUE 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• SYLOB • SYMA MECANOPOLIS • SYNDICAT MIXTÉ DE LA ZONE AÉROPORTUAIRE TARDES-LOURDES-PYRÉNÉES • TDM INGÉNIERIE • TECHNIFAN • TELERAD • TELESPIAZIO FRANCE • TESA • TEUCHOS • TFE • THALES ALENIA SPACE • THALES DIVISION AÉRONAUTIQUE LE HAILLAN / PESSAC • THALES DIVISION AÉRONAUTIQUE TOULOUSE • THALES DIVISION SOLUTIONS DE SÉCURITÉ & SERVICES • THERMI GARONNE • THIOT INGENIERIE • TOFER • TOSOS • TOPTECH FRANCE • TURBOMECA • UIMM ADOUR-ATLANTIQUE • UIMM ADOUR-PYRÉNÉES • UIMM GIRONDE-LANDES • UIMM MIDI-PYRÉNÉES • UNIVERSITÉ BORDEAUX 1 • UNIVERSITÉ DE PAU ET DES PAYS DE L'ADOUR • UNIVERSITÉ DE POITIERS • UNIVERSITÉ DE TOULOUSE-LE MIRAIL • UNIVERSITÉ PAUL SABATIER • UNIVERSITÉ SCIENCES SOCIALES DE TOULOUSE • VALTECH • VEGA TECHNOLOGIES SAS • VIVERIS TECHNOLOGIES • VODEA • WITHYOU • WTS • ZTI

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