
The French aerospace innovation cluster Aerospace Valley
November 2011
aerospace valley
Le collectif qui rend compétitif
Pôle de compétitivité mondial
Aéronautique, Espace, Systèmes Embarqués
Midi-Pyrénées & Aquitaine
RÉGION MIDI-PYRÉNÉES
REGION AQUITAINE
Grand Toulouse
COMMUNAUTÉ URBAINE
LA CUB
LES PÔLES DE COMPÉTITIVITÉ

“Cluster” versus “pôle de compétitivité”

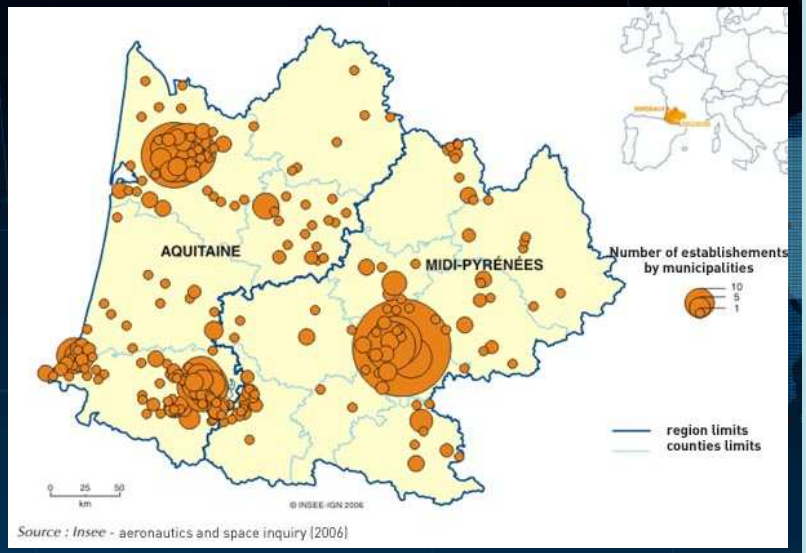
Michael Porter’s definition of cluster as:

“geographically proximate groups of interconnected companies and associated institutions in a particular field, linked by commonalities and complementarities” [Harvard, 1998].

Our interpretation:

• a market oriented “cluster” focuses primarily on SMEs and the entire supply chain
• the regional “pôle de compétitivité” à la française are mainly technology oriented “think tanks” aiming at stimulating innovation and cooperation between industry, research and training (TRL 3-6).

The Aerospace Valley Cluster Association



Source : Insee - aeronautics and space inquiry (2006)

- Bi-regional aerospace cluster
- Activities: aeronautics, space and embedded systems
- Date of creation: July 2005
- Legal status: Association formed by companies, research centres, training centres and local and regional authorities
- Oct. 2011: 570 members, of which 273 SMEs
- 7 electoral colleges
- President/CEO: Agnès Paillard, EADS
- Permanent staff: 10 people (+ “volunteers”)
- Budget for running costs: 1.6 M€ / year

aerospace valley

MINISTÈRE DE LA DÉFENSE

REGION AQUITAINE

RÉGION MIDI-PYRÉNÉES

COMMUNAUTÉ URBAINE DE BORDEAUX LA CUB

le Grand Toulouse communauté urbaine

LES PÔLES DE COMPÉTITIVITÉ
MOTEURS DE CROISSANCE ET D'EMPLOI

- **Product portfolio:**
- Civil and regional aviation
- Business aviation
- Military aviation
- Turbo-engines
- Cockpits
- Land gear equipments, aero structures, etc
- Satellites
- Launchers, propulsion and atmospheric re-entry
- Space services
- Automotive and railway electronics

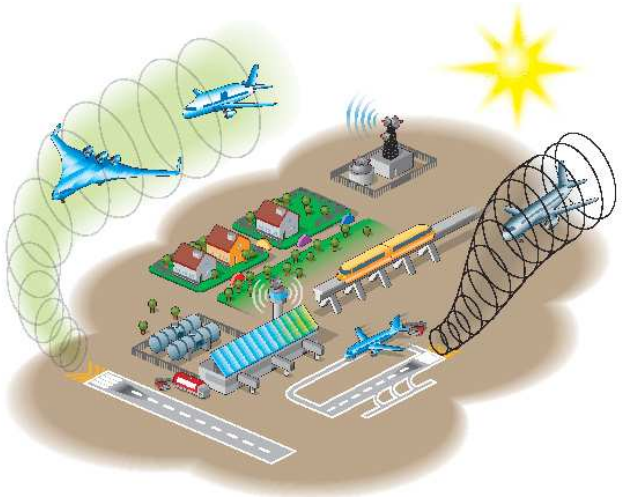
1500 industrial establishments
= 10 billion € annual turnover
= 80% of industrial work force member of Aerospace Valley

Cooperative projects resulting of nine strategic core R&D sectors (“think tanks”)

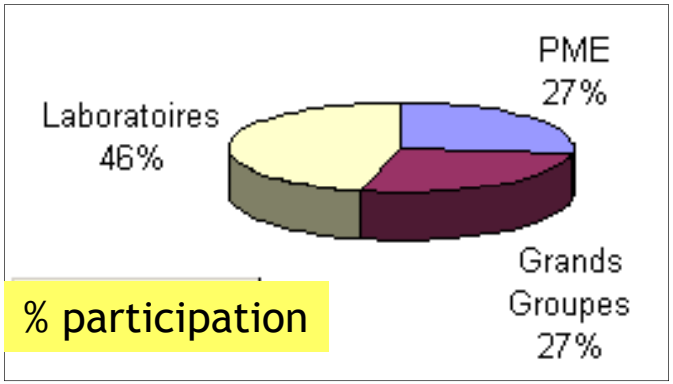
1. Aero-mechanics, materials, structures
2. Energy, propulsion, engines and access to space
3. Air transport safety and security
4. Living Earth and space
5. Navigation, positioning, telecommunications
6. Embedded systems
7. General engineering and collaborative production
8. Maintenance, services, training
9. Autonomous aerospace systems

R&D Funding mechanisms

Cluster « labellizes » the projects that are then financed by mixing funds of public agencies (FUI, ANR, OSEO), territorial collectivities and entreprises (such as to remains Brussels compatible)



Status September 2011:
480 projects approved by AV
246 projects finally financed
accumulated 1500 participants



- Total budget of financed projects: **725 M€**
- Total amount of private funding: **418 M€**
- Total amount of public funding: **307 M€** (45% of FUI)
  (public funding for SMEs: 72 M€)

Structuring Projects - full geographical coverage

NEOSTAR

ADER 2

CIFSE

INRIA
P-TAU
P2P
AEROPARC
Plan AEROTEC

HELIMAINTENANCE

MONTAUDRAN CAMPUS
CRISTAL/CESAR
INTESPACE
NAVIGATION VALLEY
BOOSTAEROSPACE
OPEES
AEROSCOPIA

LP-TAU
ATA

CANOE
LYNCEO

PER PATS

EPEA
CEMAS
DEFI COMPOSITES
FOUDRE
SAA

TECHNOCITE
COMPOSITADOUR

CEGNSS / GUIDE
PSTA
E-Santé
Platinnovtherm

PRODIGE

EOLE/AEROPOLIS

TARMAC

CLUSTERA
CATALOGUE INTERACTIF
PROGRAMME S FEDERATEURS

PRIMES

International Cooperation

6 very high and 5 high-priority target countries