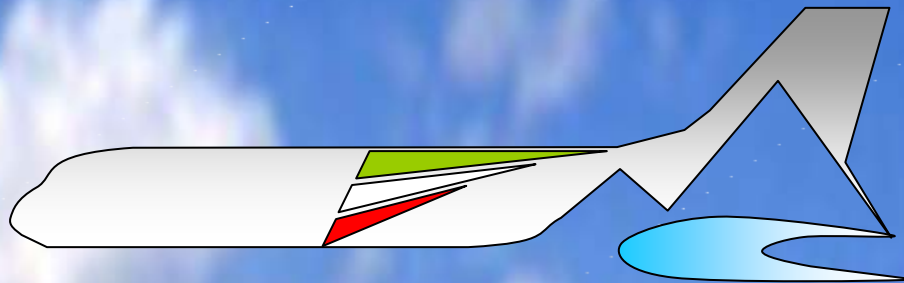


Focus on Aerospace in Campania Region

Ing. Luigi Iavarone

European Parliament - February 6, 2007





Aim



- ▶ Aim of the presentation is to give to the Commission some base elements to better know the Campania productive reality with a particular focus on Small and Medium Enterprises and on local Institutions actions for their development
- ▶ The joint presentation of the Piemonte and Campania aerospace sector tend to value furthermore the italian presence in Commission programmes through joint and integrated actions



The aerospace sector

Aerospace market value:

- ▶ Currently estimated to be around 187.550 M€, and 68.400 M€ out of the total amount are allegedly rising out of aeronautical sector
- ▶ Italy is contributing about 6.000 M€ (8,1% of the European market) to the total market
- ▶ Campania region is contributing at least about 1.000 M€ (16,7% of Italian market)

**For Campania is at least 1.000 M€
(16,7% of Italian market)**





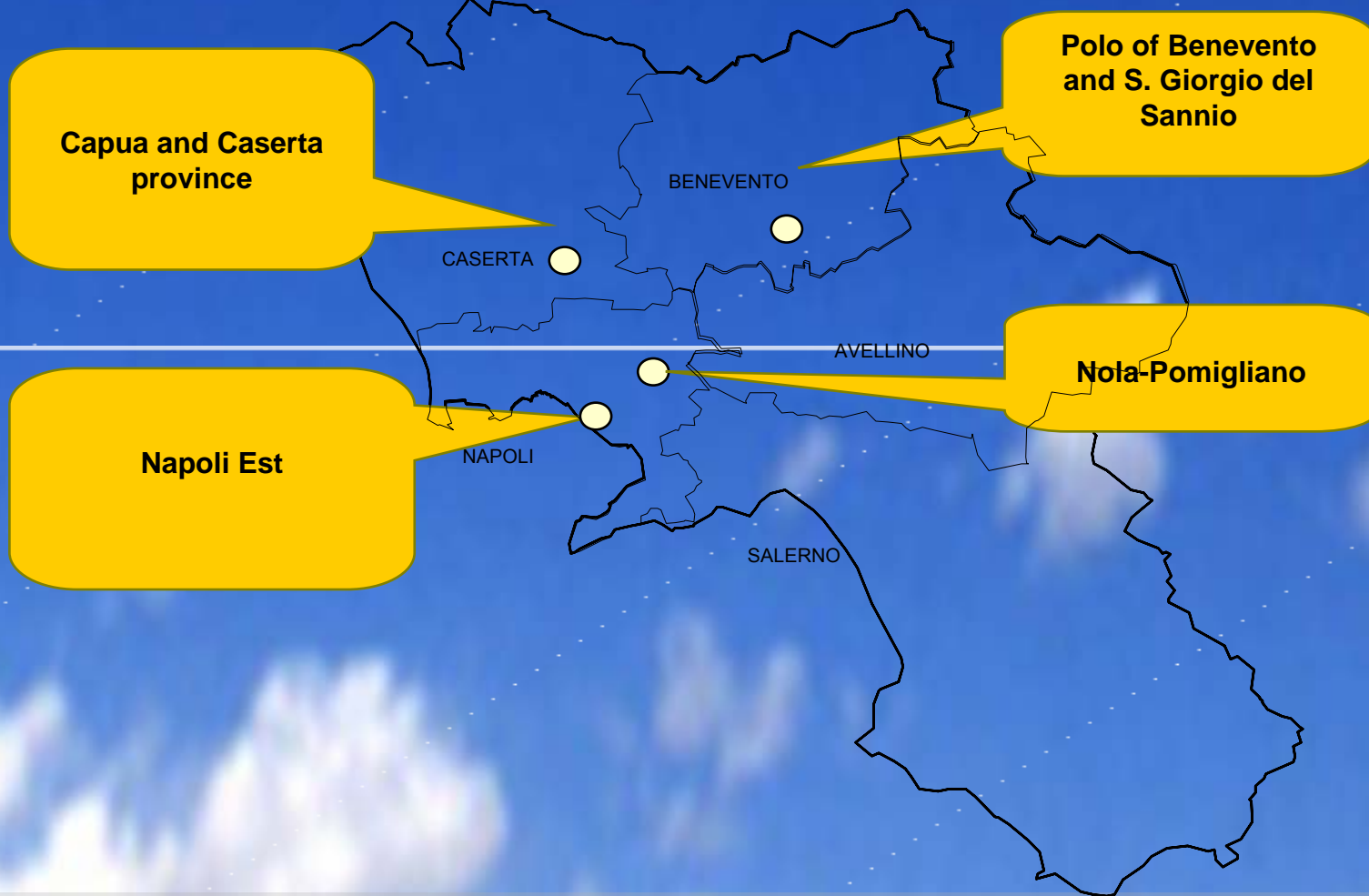
Aerospace sector in Campania region

- ▶ Campania Region is one of the five aerospace poles in Italy, not to mention Lombardia, Lazio, Piemonte and Puglia
- ▶ Around one thousand subjects among SMEs, big enterprises and research centers involved in the aerospace sector – over 7% of the national sector enterprises
- ▶ Over ten thousand employees – around 9% of the national aerospace employees
- ▶ A turnover of around one million euro per year (42% is from SMEs)
- ▶ The aeronautic sector is the main sector with a strong presence of manufacturing factories such as Alenia Aeronautica, Avio, Europea Microfusioni Aerospaziali, Magnaghi Aeronautica, Selex S.I. and maintenance and PAX/Cargo conversion factories such as Atitech, Officine Aeronavali, etc.
- ▶ About 10 SMEs companies aggregation / consortium: SAM (Mediterranean Aerospace Company), ARTEMA, ALI, SFERA, Technova (Innovation Politecnico Consortium), In.Tec.Na., Antares, Tecnocaserta, Aerocampania.
- ▶ Companies acting in similar and linked technology sectors such as Telecommunication, Information Technology, Mechanical, Electronic, Automation, etc.



Aerospace sector in Campania region

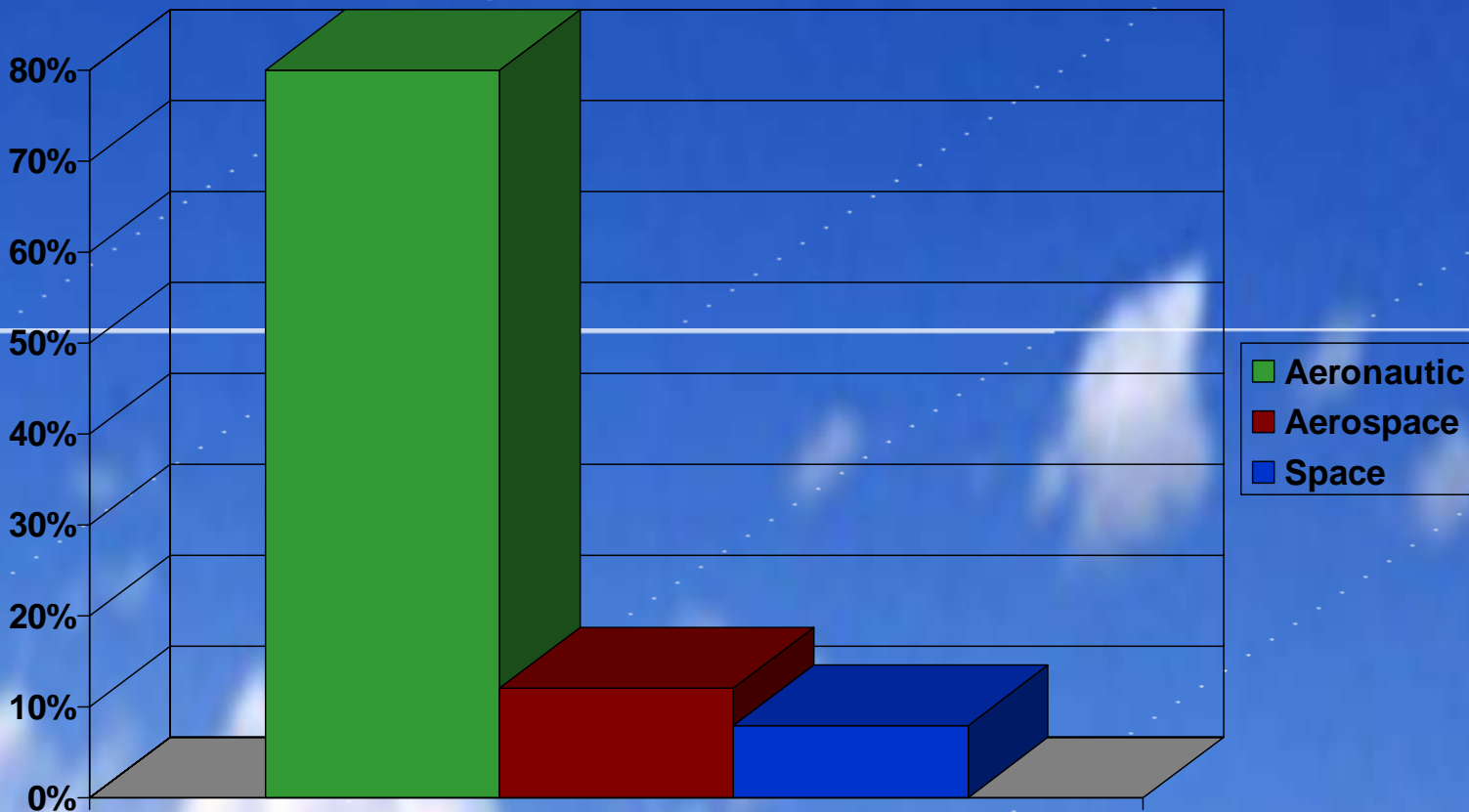
Campania's Aerospace sector is mainly scattered all over Naples surroundings and province (79% of enterprises), due either to several huge factories lodged on the spot, such as Finmeccanica companies, whose branches are either located in Nola, Pomigliano d'Arco and Casoria and as Avio (ex Alfa Avio).





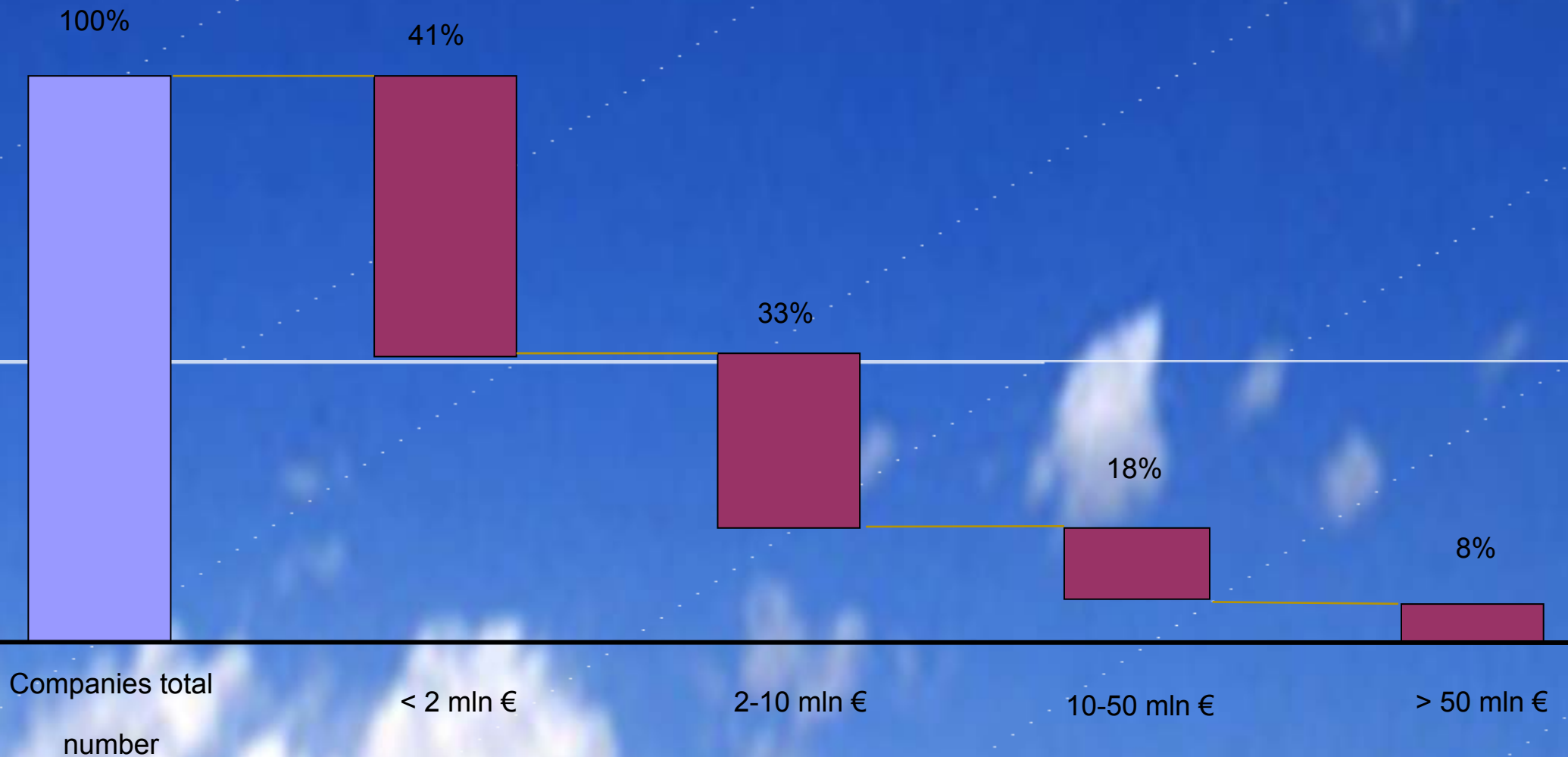
Aerospace organisation chart

The large number of companies is from aeronautic sector



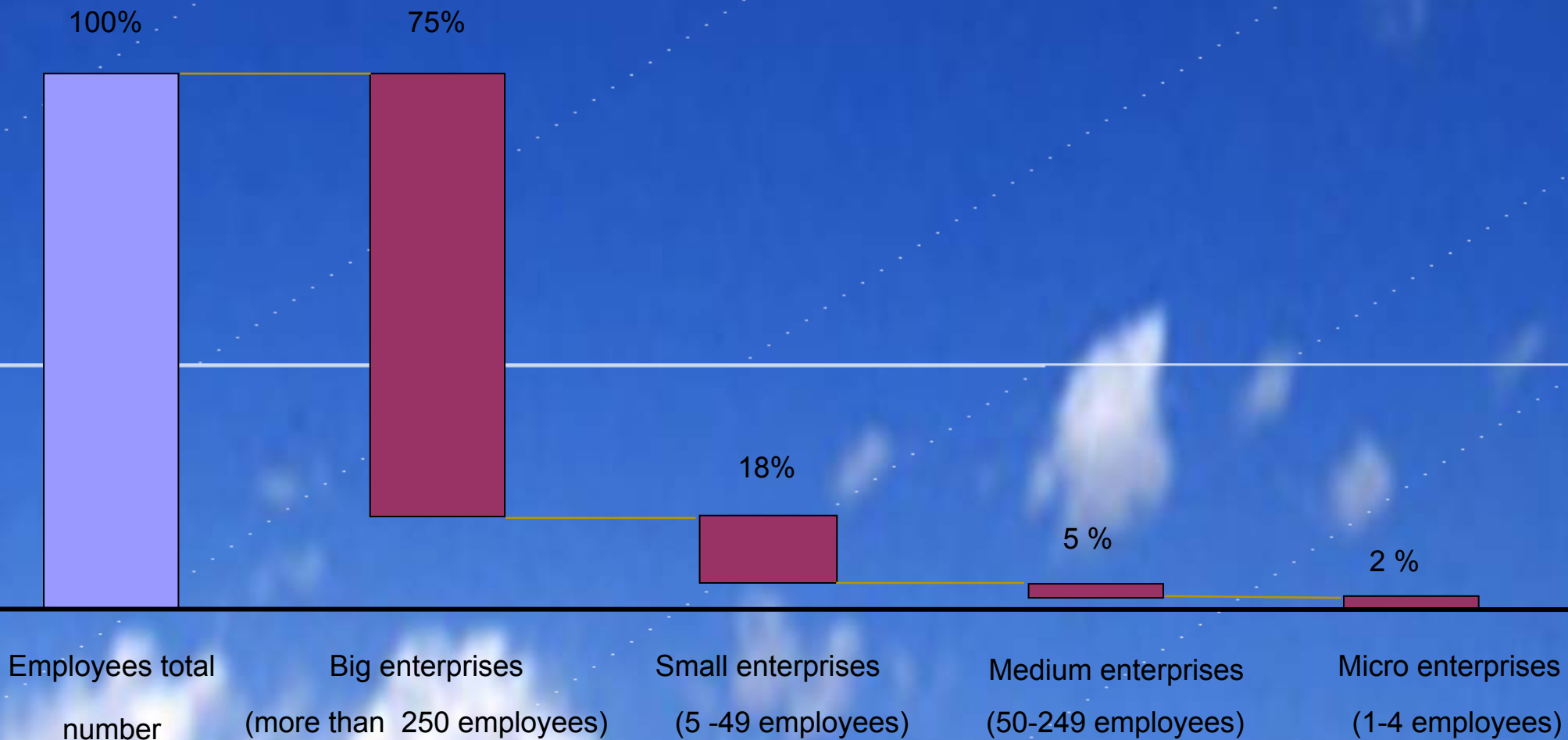


Aerospace companies dimensions





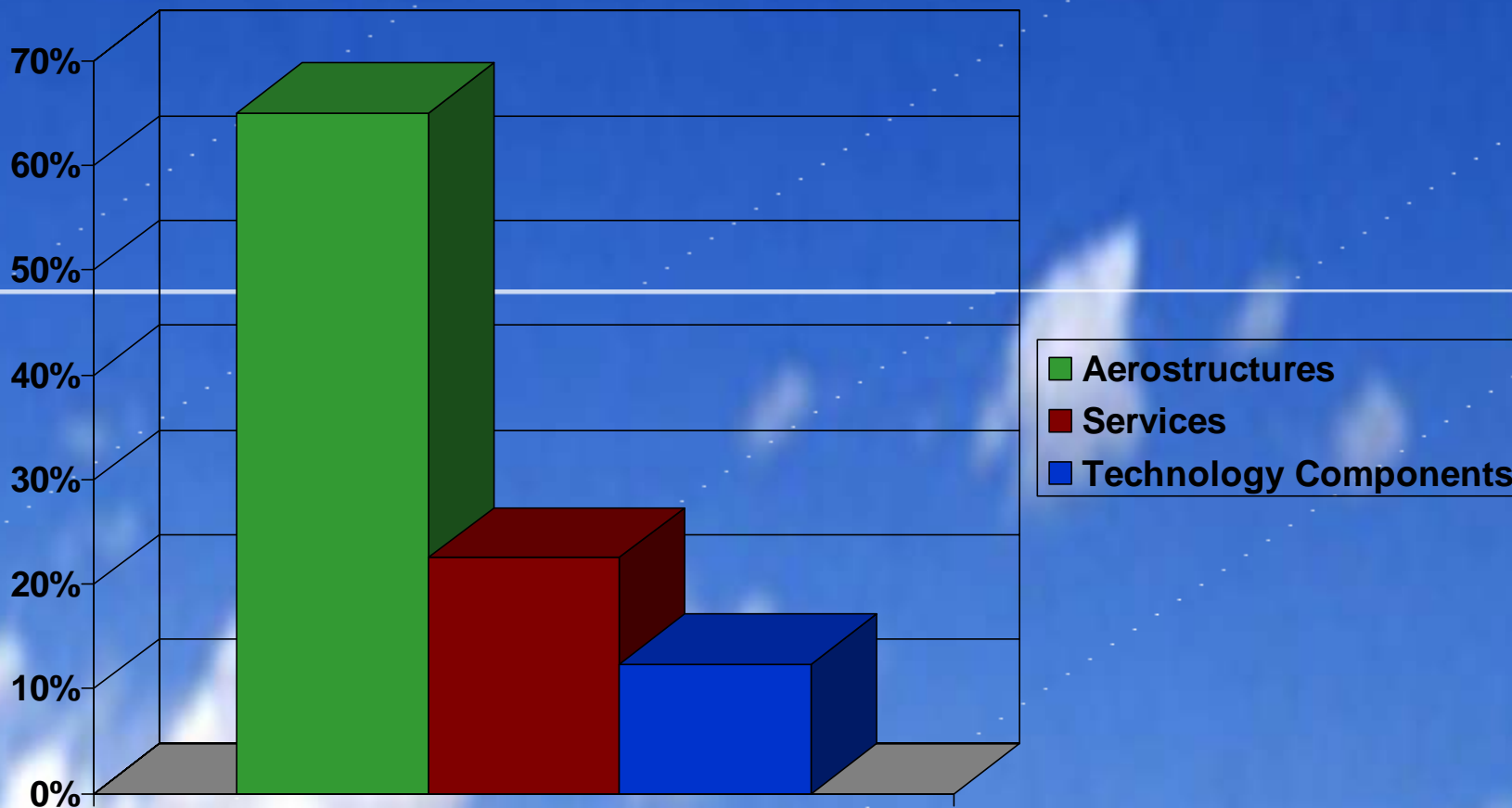
Aerospace companies dimensions





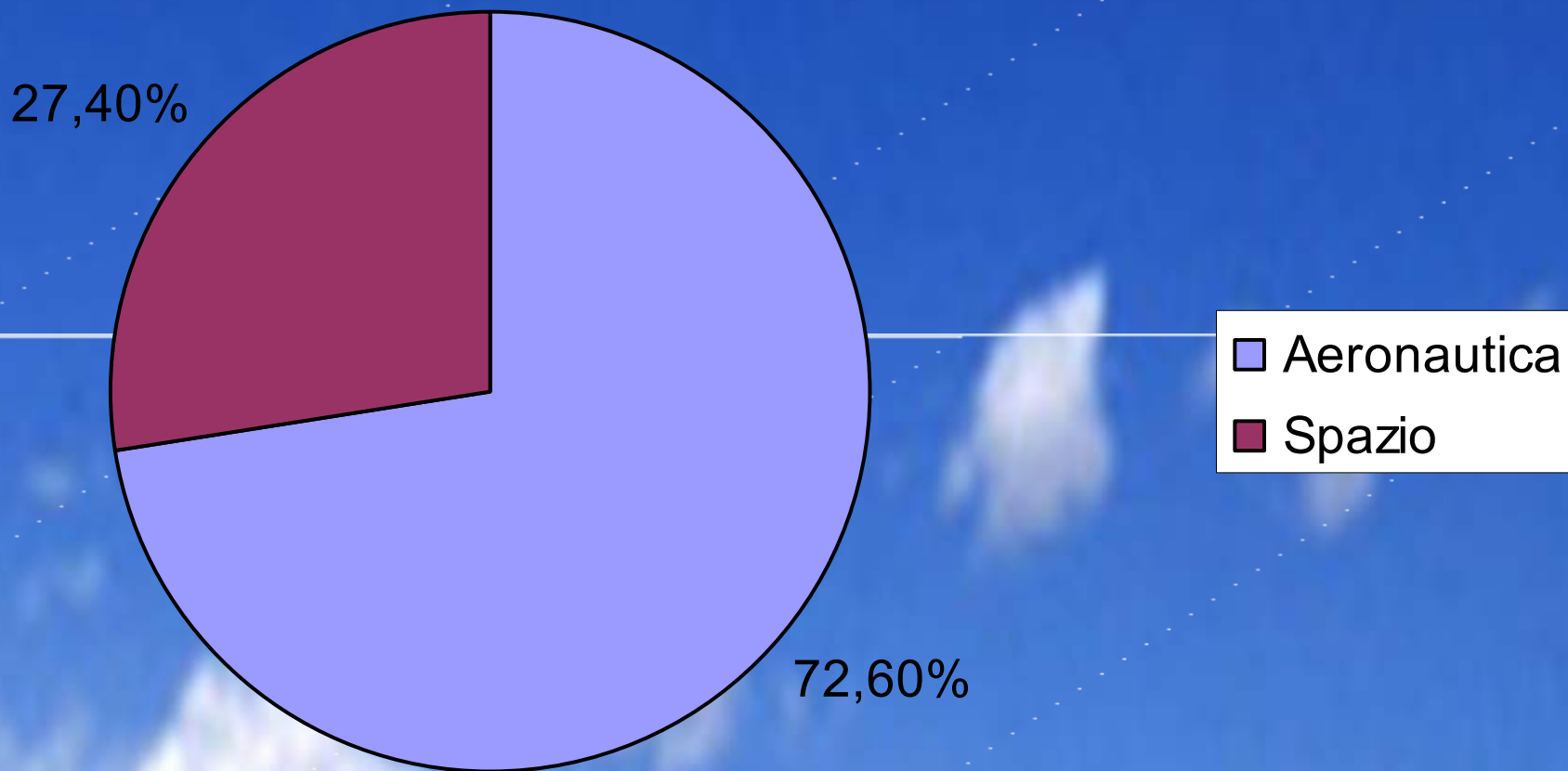
Production spreading

Deeply rooted in our territory not only by its manufacturing factories but also by its top notch know-how level as well as thanks to its production history



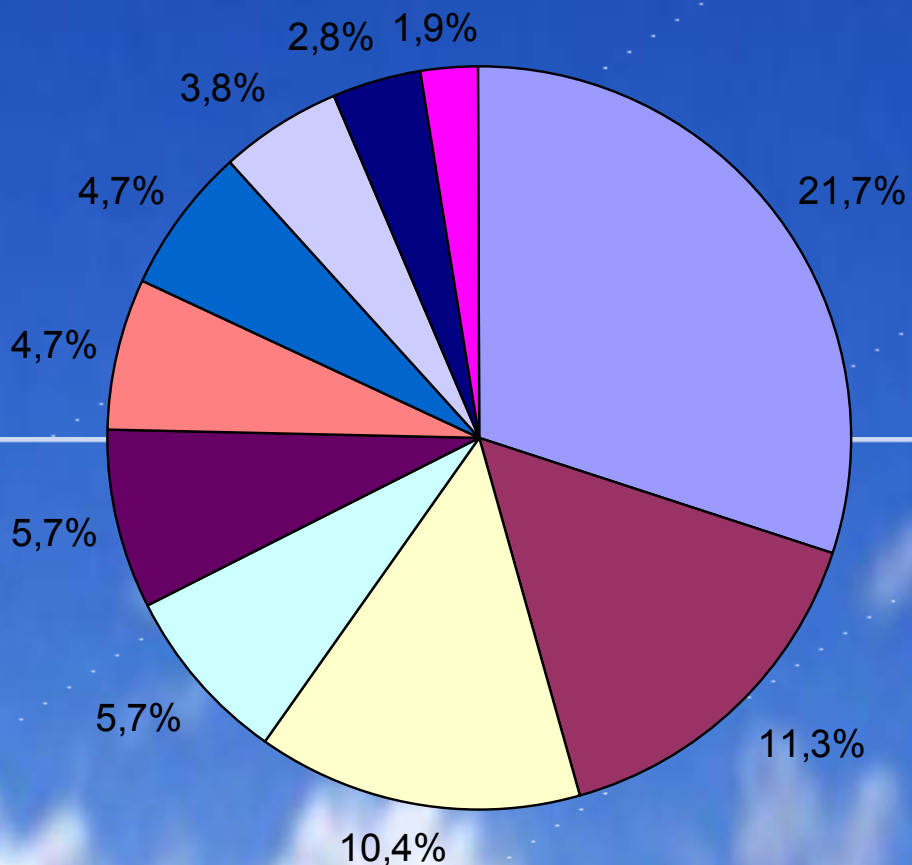


Campania aerospace SMEs





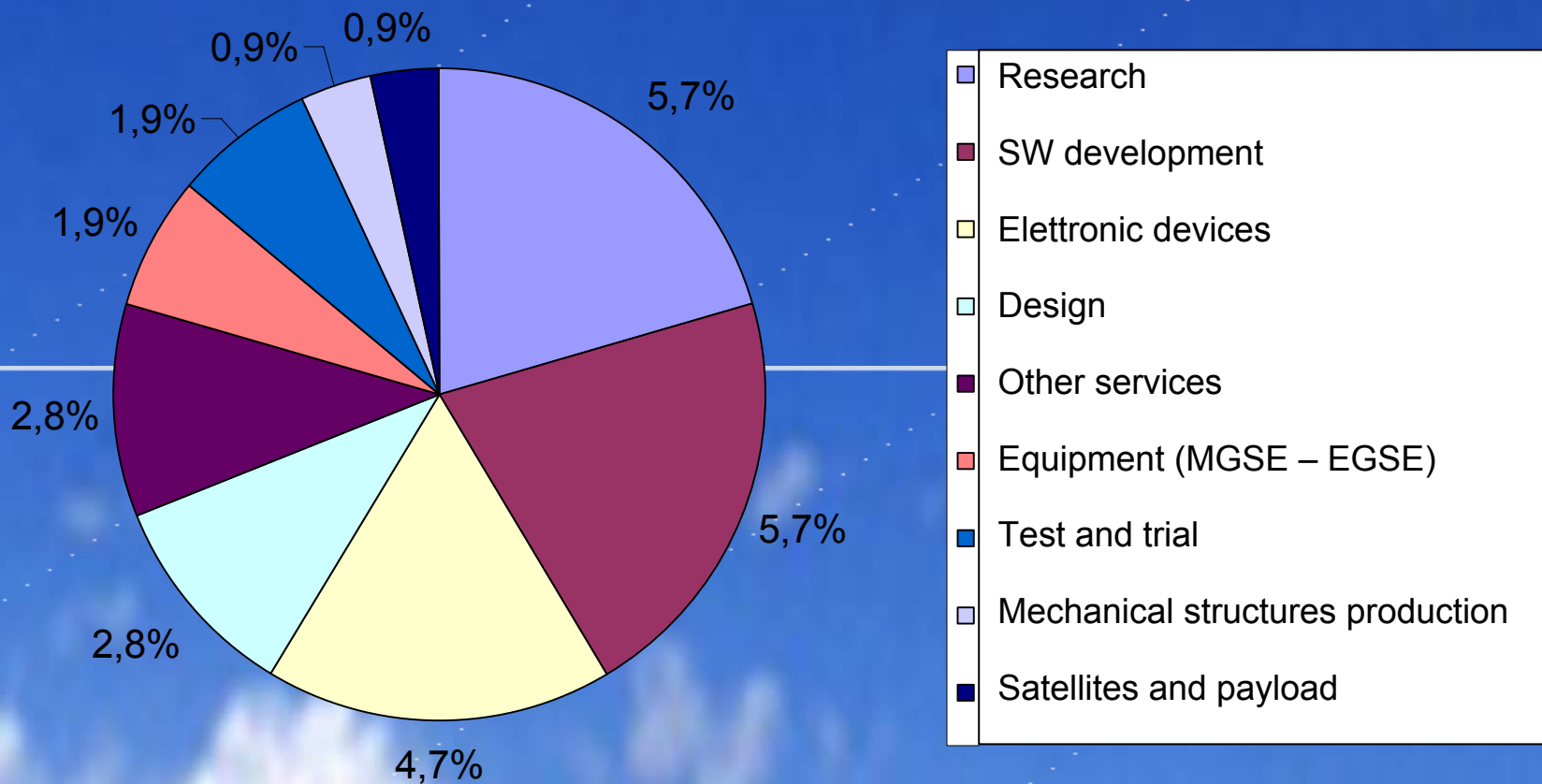
SMEs AERONUATIC per activity type



- Mechanical structures production
- Mechanical industrial equipment
- CAD/CAM design
- Elettronic devices
- Maintenance and conversion
- General aviation
- Test and trial
- Research
- SW development
- Other services



SMEs COMPANIES per activity type

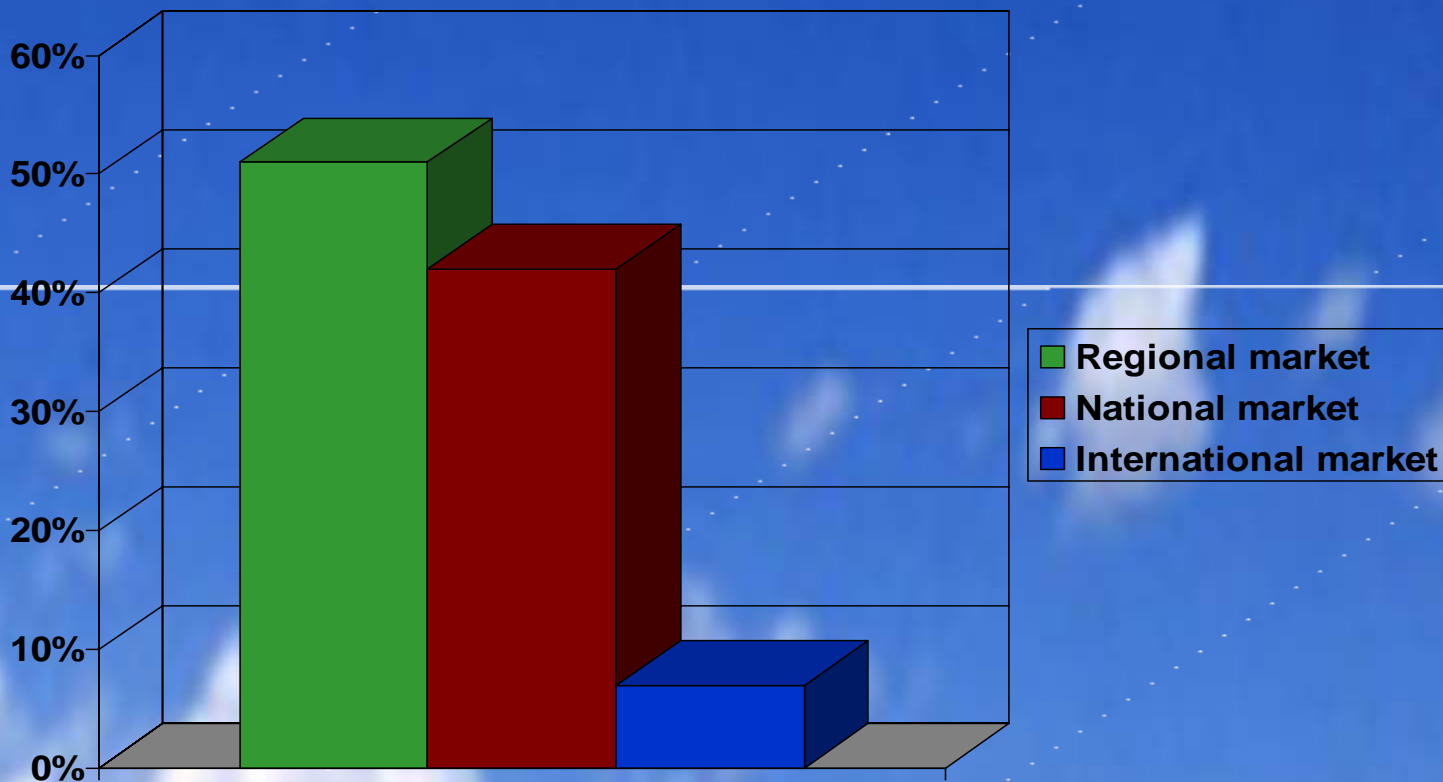




Market spreading



Around 51% of the turnover is from the big regional committees





Some products



P2006 - twin engines aircraft





Some products



A109 landing system



C27J landing system





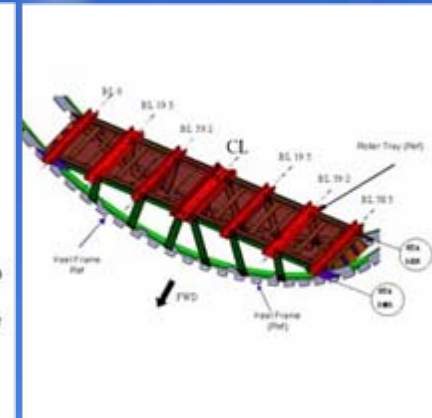
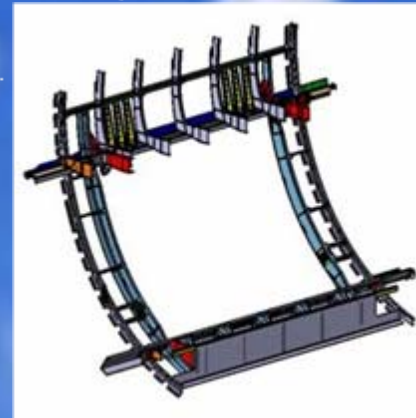
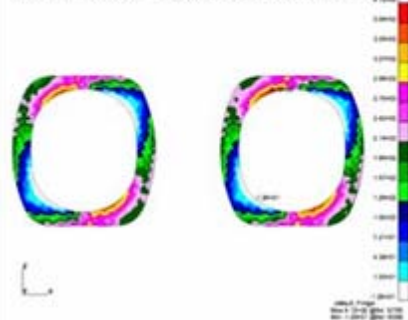
Some products



CAD A380
SECT. 15 FUSELAGE



CAE - DETAILED MODEL
WINDOW CUT OUT RESULTS -
MAX TENSION - MAX BUSHING STRESSES





Some products

Economy Class Seat



Business Class Seat



VIP Class Seat



Lavatory



Galley



Wardrobe





Some products



USV Space Vehicle





The main developed products/programs

- ▶ Campania enterprises are deeply involved into the realisation of either A300/A380 AIRBUSES models , or of Boeing B767, as well as into the new “B7E7” aircraft designing, into McDonnell Douglas MD aircrafts realisation and eventually into ATR aircrafts construction.
- ▶ Other activities concern maintenance services for almost all the commercial and military aircrafts such as G222, C27J, AMX, Tornado, Atlantic, A109, A129, CH47 e HH3F.
- ▶ Moreover, the Italian Aerospace Research Centre (CIRA) is currently involved into UAV (Unmanned Aerial Vehicles) and USV (Unmanned Space Vehicles) new projects fulfilment.



Public initiatives

- ▶ Campania Region, by the so called “Contratti di programma” (Program contracts), has lately been participating into any field’s remarkable initiative’s rising and development. Atitech – a company controlled 100% by Alitalia company- and S.A.M.’s – Mediterranean Aerospace limited liability consortium company - sponsored programs created 473 new jobs and attracted over 76 euro millions investments, by a public contribution of 44 euro millions, over 18 millions of the whole amount as regional finance’s charge.
- ▶ In 2003 Campania Region financed, by POR Campania funds, 10 test projects’ start-up to the creation of the same number of “Centri Regionali di Competenza” (Regional Competence centres). Such projects are over by now or about to be finished and some of those Centres have already been registered as autonomous juridical person. Some of those Centres’ activities are strongly connected with the aerospace department, as for instance those performed by the TEST Centre (involved in transports).



Public initiatives

▶ Campania Universities are characterised by an outstanding, traditional and internationally recognised skill patrimony in aerospace field. The main departments involved are, for Naples University “Federico II”: Aerospace Engineering, Structural Projecting and Analysis department, department, Materials Engineering and Production department as well as Electronic Engineering and Telecommunications department; while, for the Second Naples University: Mechanical Aerospace Engineering department .

▶ IMAST: polymeric compound materials and structures technological district's main purpose is to achieve some development actions in the field at stake, aiming to activate scientific researches able to stir up our early competitiveness development actions as well as to innovate different areas such as the aerospace one. What's more, IMAST, thanks to Region and Government former agreement on the point, has been granted 70 millions euro to pursue its objectives.



Universities

- ▶ Naples University “Federico II” , with the Aerospace Engineering Department
- ▶ Naples Second University
- ▶ Napoli University “Parthenope”
- ▶ Salerno University
- ▶ Sannio University

Main Research Centres

- ▶ CIRA – Italian Aerospace Research Centre
- ▶ MARS - Microgravity Advanced Research and Support Centre
- ▶ CNR IREA- National research Centre
- ▶ CORISTA – Advanced tele-probes research Consortium
- ▶ MARSec - Mediterranean Agency for remote sensing and environmental control.

Technological and Scientific Parks

- ▶ Technapoli – Naples and Caserta’s Scientific and Technological Parks
- ▶ Salerno and Campania outback ‘s Scientific and Technological Parks



Development strategies

- ▶ **CIRA - Italian Aerospace Research Centre** as a focal point for research activities in local and national aerospace industry
- ▶ **“Comitato Promotore del Progetto Galileo”** formed in the 2004, promoted by the Chamber of Commerce of Naples with the participation of Campania Region, Napoli Council, Naples Engineers Association
- ▶ The **“Aerospace Commission”** of the Naples Industrial Union, with a focus on sector strategies in terms of collaboration between big enterprises and SMEs and of information and collaboration for R&D activities
- ▶ Napoli (University Federico II) has been chosen to host the **“Summer Session 2008”** of the **ISU – International Space University**
- ▶ Increase the participation of SMEs in aerospace international events (Airtec, AeroMart, China Space, ecc..)
- ▶ New initiatives for the development of the aerospace sector such as adjustment and realization of airport infrastructures, Space Camp, ecc.)
- ▶ SMEs support to form aggregation with the aim of an autonomous marketing and selling of their own products and to form partnership in the international markets



Conclusions



All the given information about the Campania and Piemonte aerospace sectors, regarding the integrated system of research, innovation and industry in the aerospace field, outlines a technologic and productive potential which, with the support of the local Institutions, of the Italian Government and of the European Commission, will contribute significantly to the Lisbon strategy in one of the strategic sectors in which Europe has already shown to compete successfully in the global market

Ing. Luigi Iavarone
Chamber of Commerce of Naples
Via S. Aspreno, 2 – Naples
Tel. +39 81 5255182/3
Fax +39 81 5255184

www.na.camcom.it
iavarone@technapoli.it

Thanks for your attention
