

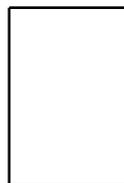
The sector of Air Space in Italy and in Piedmont

Turin, Italy - The field at Italian and local level is rich of industries

“The aerospace sector comprises two distinct areas of research and application: the aeronautical field, in other words, everything which makes part of you or your flight and transport (being it human or material) within the Earth’s atmosphere (aviation, avionics, aeronautical engineering, aircraft and military helicopters) including space, together with the activities that develop outside the Earth’s atmosphere, with a predominant objective research and planetary observations – that is: observation satellites, navigation, shuttle, and telecommunications. The main application fields of the space sector are: Telecommunications, meteorology, Earth Observation and monitoring, satellite navigation, a man in space, science and nanotechnology, and the delivery systems. Not all companies and corporations operating in the aerospace industry develop both of the production sectors (aeronautics and space). It is indeed composed of areas with very different targets, the very first commercial and tied to exports which is the second ‘Captive Market’ and sensitive to their applicability in different context of research including medicine. Further classification of the aerospace industry is that between the civil and defence (military). The defence sector is particularly important not only in terms of production and research, but also for the development of new advanced technologies. Aerospace industry in Italy Sixth in the world and fourth in Europe with a turnover of around 8 billion Euros, and a highly skilled workforce of 39,000 employees, the Italian aerospace industry is the main manufacturing sector in Italy; in terms of highly integrated systems technology. The investment in research and development equals to 14-15% of total revenues, has led to considerable achievements awarding major contracts. At national level it measures up to the importance of exports in the sector of total manufacturing Italian exports, with a rate of 1.45 in the last five years. This is a percentage which is far greater than the weight of the employment sector which is about 1%, thus highlighting the role that plays foreign demand in the economy of the sector. The big Italian companies occupy leading positions in international level, for example, Alenia, 100% controlled by Finmeccanica, is fifth in Europe and the thirteenth

in the world and we expect a further increase of the position, through the expansion of its network through International collaboration and increase of its own role. National Employment Data The personnel who currently work in the aerospace industry and the personnel that will operate in future must be ready and prepared to adapt to developments in technology. This implies the need for a solid technical and scientific preparation. The workforce of firms in space and aeronautics, the main constituent in almost equal measure, clerks (28%) and technicians (27%), with a high percentage of paintings (11%) and a relatively high percentage (45%) of productions workers are specialised in 9%. The personnel of these companies are made up predominantly of young employees an average of 78% aged between 25 and 40 years. The distribution shows the percentage of 73% of men and 27% of women. The personnel is fairly young, this figure is explained in the light of the fact that most companies have a fairly recent history. Companies set up in recent decades, many of which often have only recently reached a significant size business, is, therefore, appropriate staff to the needs of innovative skills previously not present in the labour market. The level of the qualification of persons engaged in direction is very high. The percentage of graduates exceeds 50%. This is not a feature seen in all types of businesses. In this case, the particular complexity of business activities, a particular attitude to interpersonal relations, a curiosity for innovations that occur in this area, not only in Italy. From the analysis carried out shows the profile of a strategically crucial area, highly qualified, not only in certain niches of the summit, but at any hierarchical level, with a professional qualification characterised by very high profile and of various quality. The personnel required by companies must be in possession, for 47% of specific experience in the field. Businesses look for the assumption for 26%, even young and inexperienced to be trained in the company in accordance with the necessary professional deficient. In the aerospace industry are of paramount importance in its technical aspects: production engineers, designers, electrician engineers, and fitters. Skills, both technical and managerial, are naturally the

main aspect – diversified and depending on the type of use. Not to ignore is the fact that it weighs together with the flexibility, willingness to learn, the capacity for innovation, and the desire to bet on themselves. In the offer there is a deliberate strategy, but in 69% of the cases, this occurs according to the need of the moment. Usually, the search for new employees is done annually in 13% of the cases and 11% every six months. As regards employment, census data show the industrial distribution of employment in major industries in Italian regions. Campania, Lombardy and Piedmont are the regions with the largest absolute values. Aerospace in Piedmont Aerospace is a significant component in the economy of Piedmont in terms of companies involved both in wealth and human resources employed. Piedmont is the third region after Lombardy and Campania with the largest number of people employed in the aerospace sector: around 300 companies operating in the territory, 10,000 employees in total and about 2.5 billion Euros annual turnover. Exports account for a significant proportion of turnover: the last data recorded by Istat in 2008 shows that Piedmont has achieved 17% of national exports (735 million), up 37% over last year. The increase in transactions covered all the main markets for the industry of Piedmont, with particularly good performance for European countries: the first trading partner in 2008 was the United States (26% of total export, + 36%), followed by Germany (22%) and the United Kingdom (17%): countries where exports have doubled and tripled, respectively over last year. Other major markets in the EU are represented by France (11% of the export sector), and Spain (7%), while outside of Europe there emerges the Canadian market, where the 5% of exports are directed by the Piedmont sector. In particular, the industry in Turin reached levels of excellence in aerospace recognised internationally. Among the defining elements of this Industry is the fact that it incorporates a wide range of activities, presented as a fact articulated and equipped with advanced skills and differentiated advanced skills and differentiated into multiple fields such as metallurgy and electromechanics, which in their turn are used in complex systems that represent the final output of the sector. The innovative solutions adopted in



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products and processes also have a positive impact on many other sectors. The resulting production chain offers many opportunities to integrate with other components of the regional manufacturing base, and in particular for SMSs. The sector has good opportunities for both companies with a strong specialisation, both for those who see an outlet in aerospace complementary to its area of production. The Piedmont area, in addition to the largest aerospace groups in the national (Thales Άlenia Space, Alenia Aeronautica, Avio SpA, Selex Galileo Microtecnica), there are more than 20 production units of medium size, specializing in the production of parts, components or entire groups functional for the aeronautics and space. Upstream of the supply and medium sized subcontracting firms that have technologies and manufacturing processes compatible with the technical standards required by the aerospace industry and ultimately complete the enterprises which assist the manufacturing to the provision of technical services to other subjects. Besides the presence of enterprise, the research and training provides valuable skills and human resources development in the sector, are the 'Leading actors' in the Polytechnic of Turin, with its departments of Aerospace Engineering, electronics, automation and informatics, the University of Turin and the University of Eastern Piedmont. Among the major research institutions in the territory relevant to the aerospace industry include: the National Institute for Metrology (INRIM), the Higher Institute 'Mario Boella' (ISMB) and Astronomical Observatory of Turin Institute - the National Institute for Astrophysics (INAF)". (Avionews) (aq) 091029114810-1110658 (World Aeronautical Press Agency - 2009-10-29 11:48 am)