

# The AeroPortal SME Analysis

on SMEs of the 1st & 2nd Aeronautics Call of FP7

*With support of the European Commission*

**Date: 15-Oct-09**

**Version: 1.3**

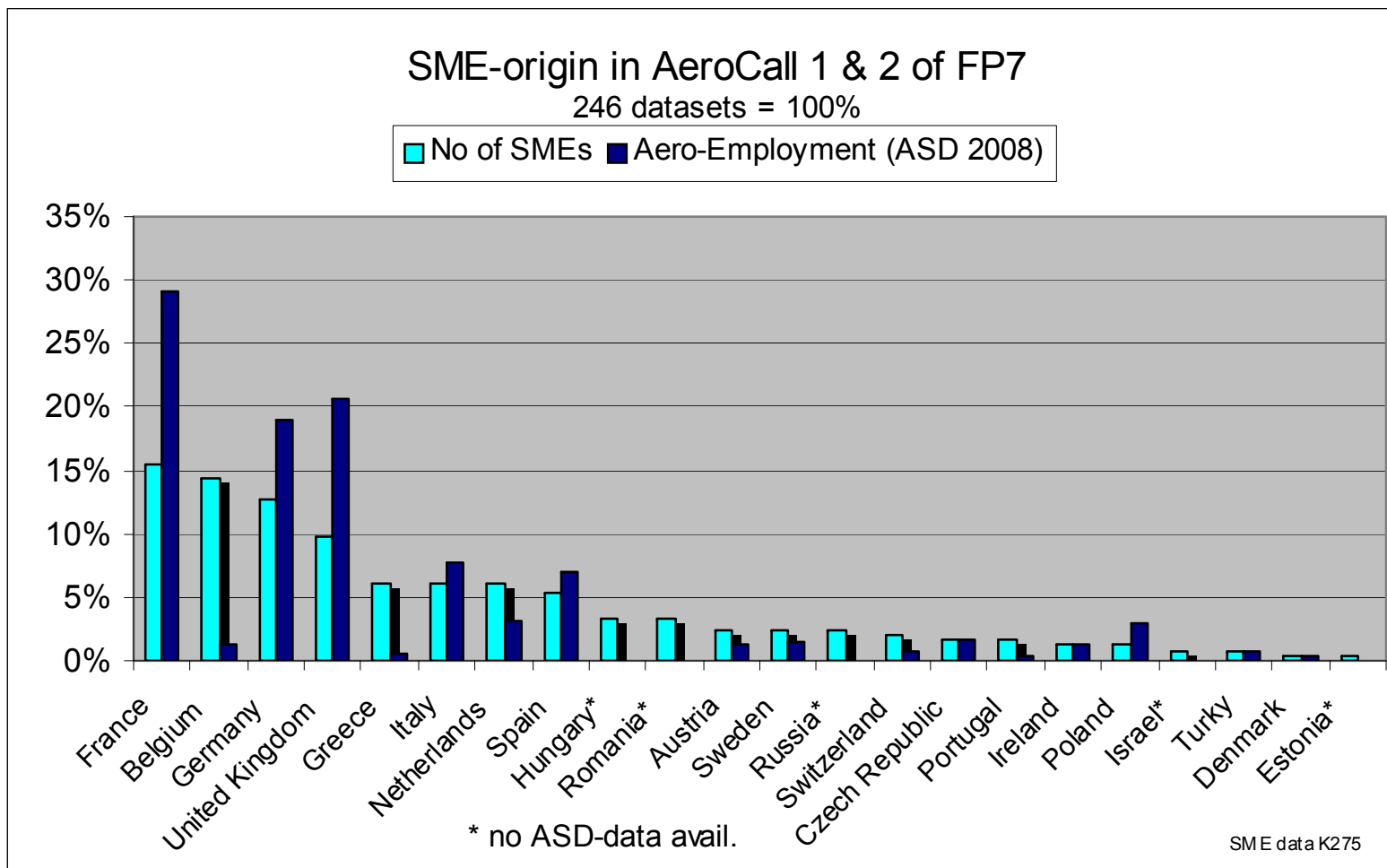
The objective of this study is to analyse the composition of SME partners in the EU aeronautics projects of FP7.

The SME's source data of Call 1 and Call 2 were provided by the EC.

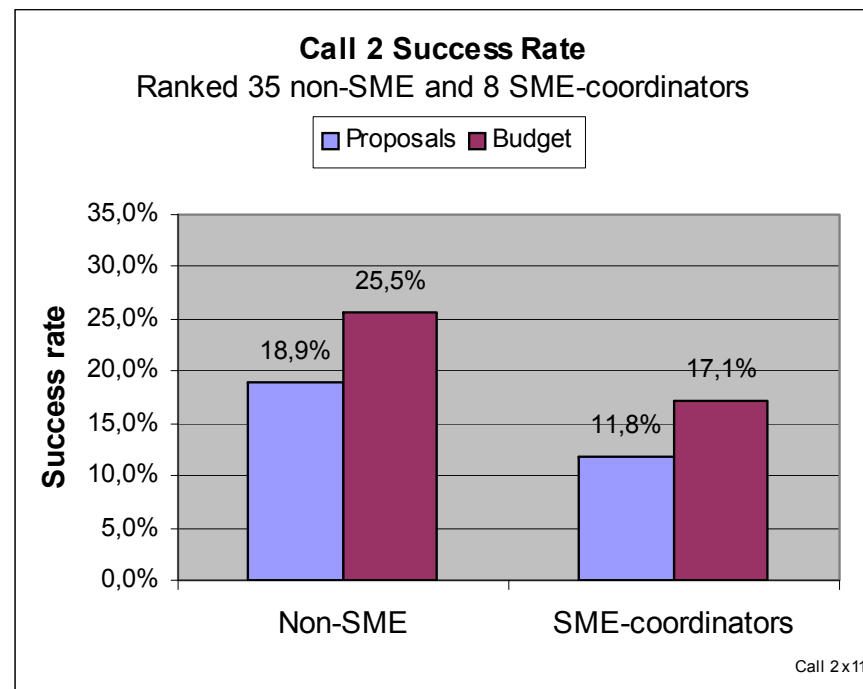
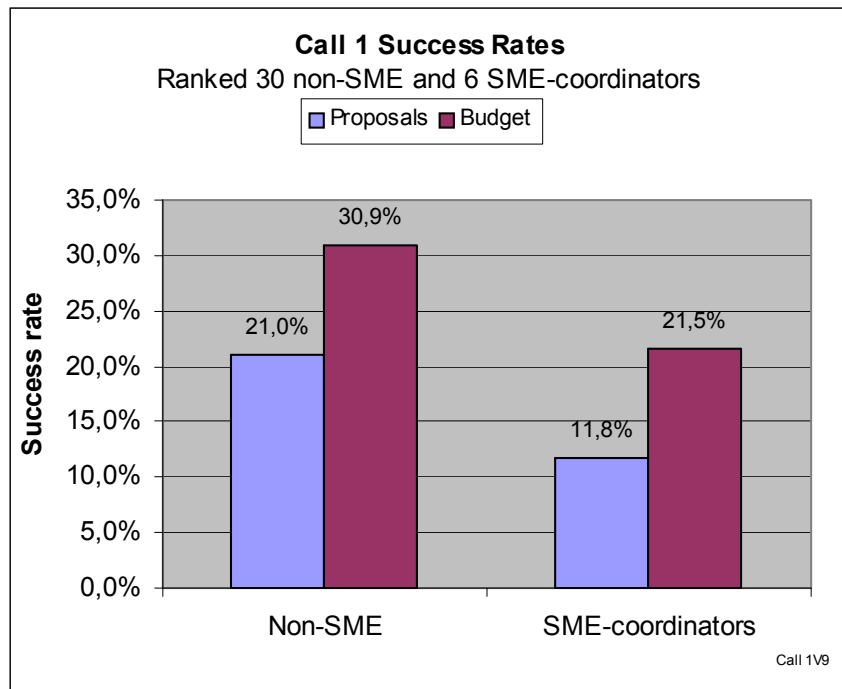
The analysis showed that

- of the **269** “self declared” SMEs **246** were “true” SMEs according to the EC-definition.
- After discarding multiple participations, **197** single SME organisations were identified as participants in Calls 1 & 2.

The following statistics are based on the 246 participants



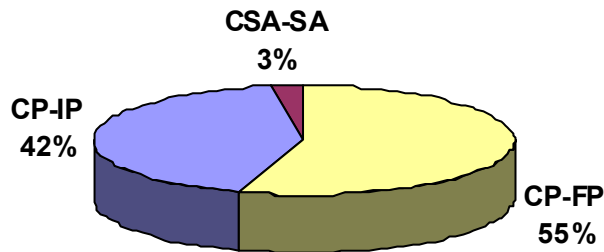
Compared is the number of SMEs in successful projects with the national employment in aeronautics as surveyed by ASD in 2008.



The success rate of SME coordinated proposals is lower as compared to the non-SME rate in the first two calls of FP7. The budgets show the same tendency.

**FP7**

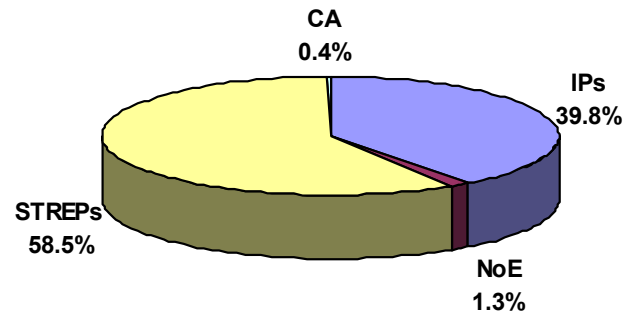
**FUNDING of SMEs in project types (tools)**  
total SME-funding is 74.5 Million Euro in Call 1&2



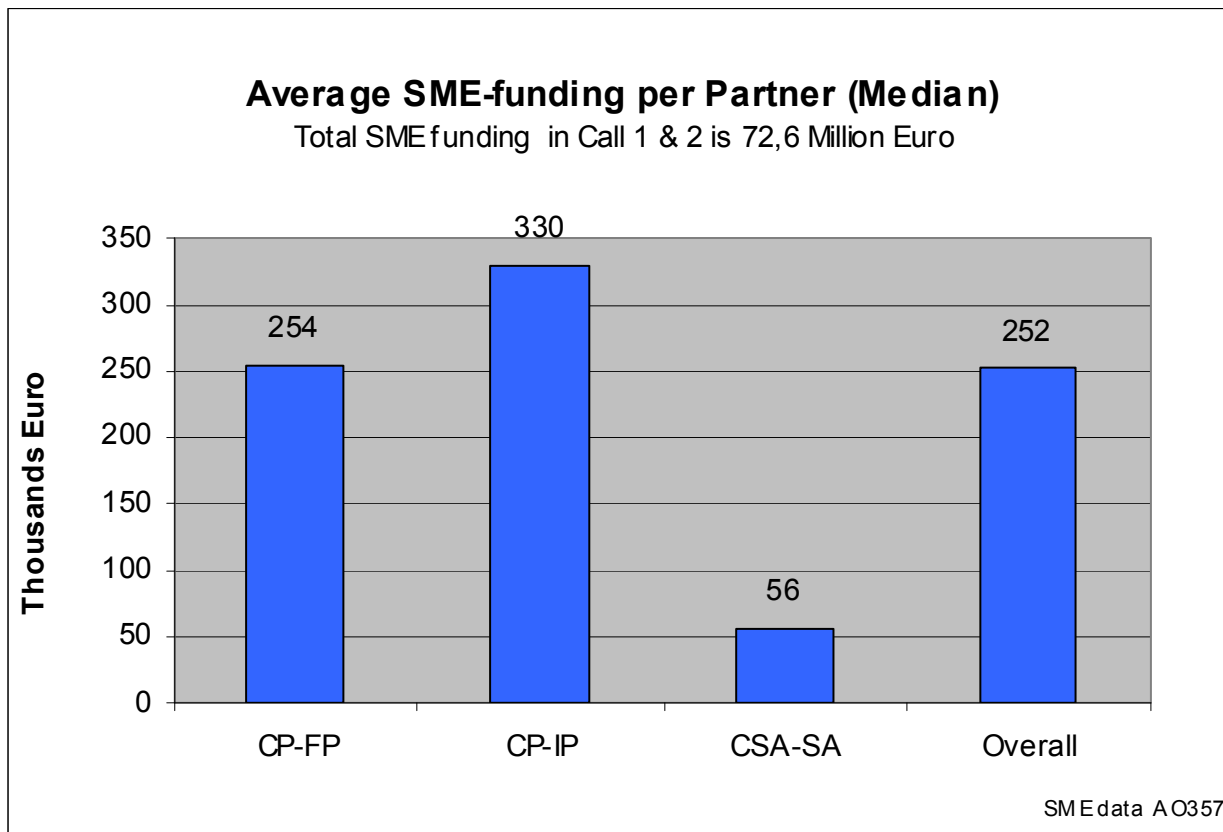
SMEdata AF292

**FP6 comparison**  
(Source: AeroSME Study)

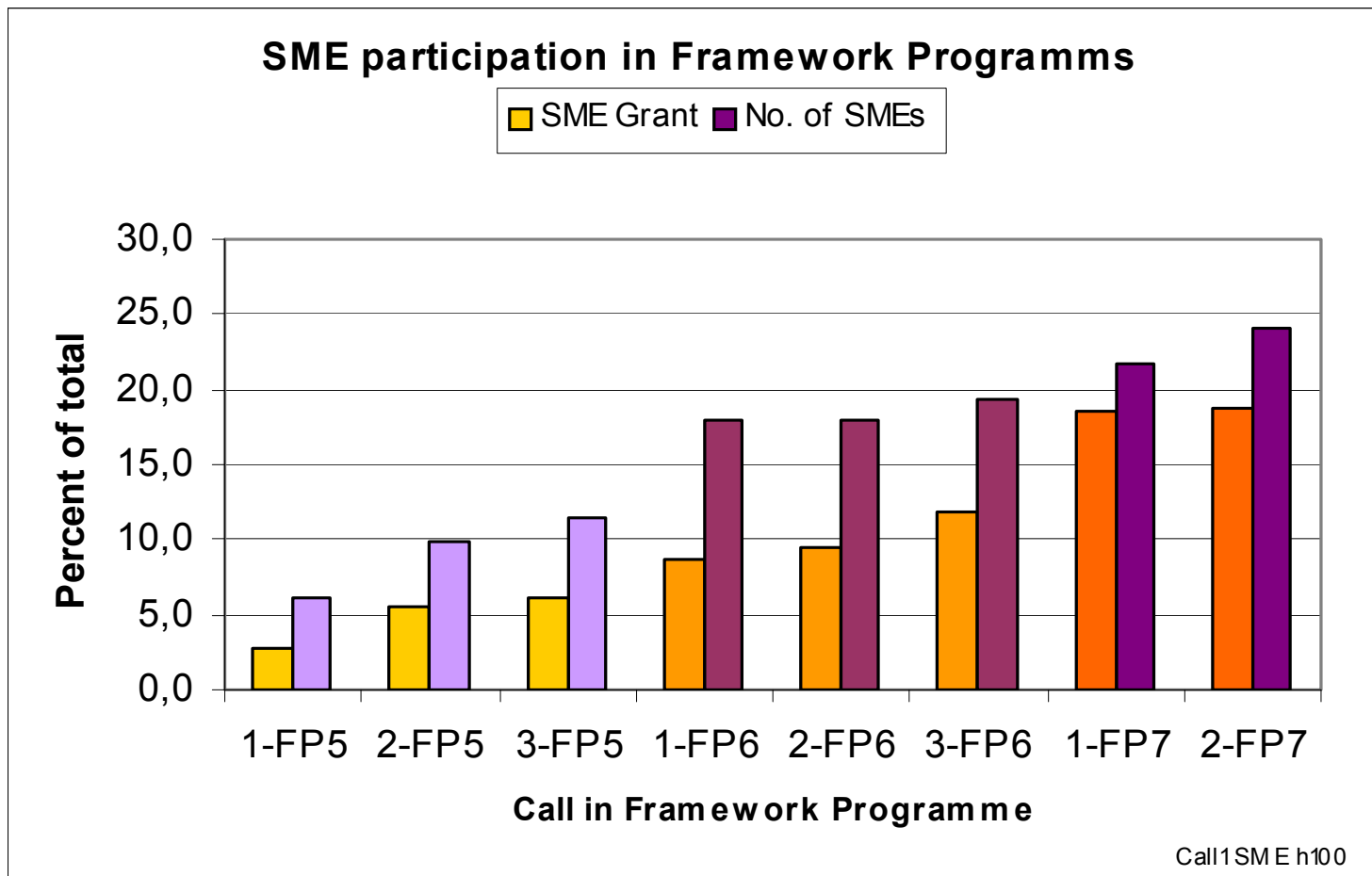
**SME Participation in FP6 per Type of Project**



SMEs participated primarily in Collaborative Small or medium-scale *focused* research projects (CP-FP), in FP6 and FP7! The participation in CSAs has increased in FP7 (but is difficult to compare).



The funding per SME is largest in Integrated Projects (CP-IP). The average funding for SMEs in ALL types of funding tools in aeronautics is 252.000 Euro.



The budget share of SMEs in Aeronautics projects rose steadily through FP5, FP6 and FP7 as did the number of SME-participants.

In order to classify the SMEs, three different classes were defined: the **SME's role in the supply chain**, their **type of activity** in the respective project and the commercial **product(s)** they offer on their internet site.

## Role in suppl. chain

Integrator  
 Supplier Hardware  
 Supplier Engineering  
 Supplier Other  
 Other Services  
 R&D or Testing

## Type

Specialist  
 All-rounder  
 Research Establish.  
 University  
 Service Provider  
 OEM

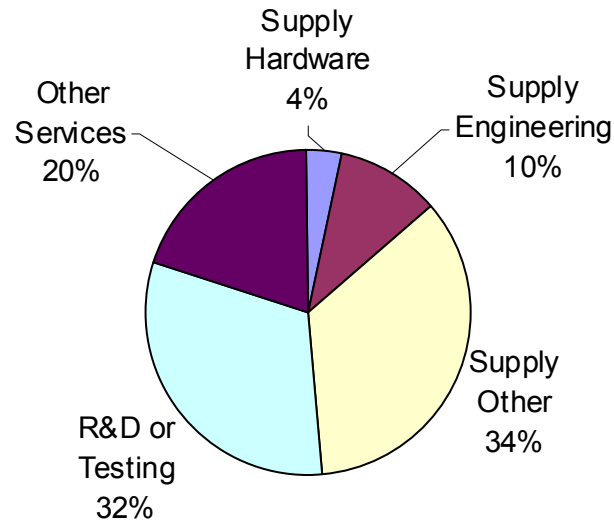
## Product

Simulation  
 Hardware  
 Know-How  
 Management  
 Other

**IMPORTANT NOTE:** The classification of each individual of the 246 SMEs relies on the company's profile published on their internet site. Therefore the following statistics represent only a good estimates.

## Supply Chain Function; Number of SMEs

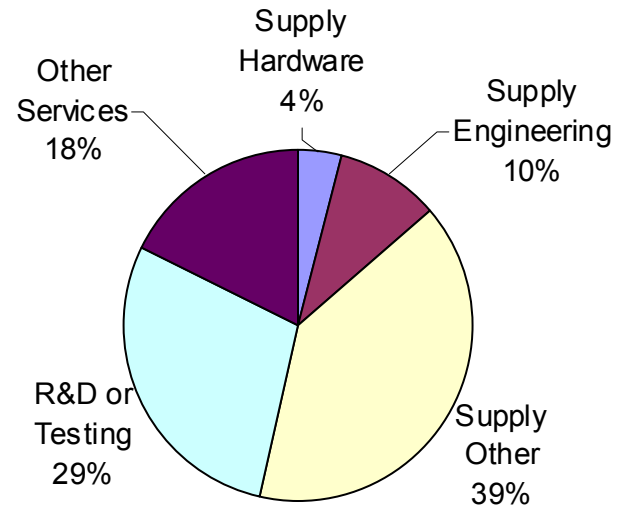
Total data sets: 246 contracts in Call 1 & 2



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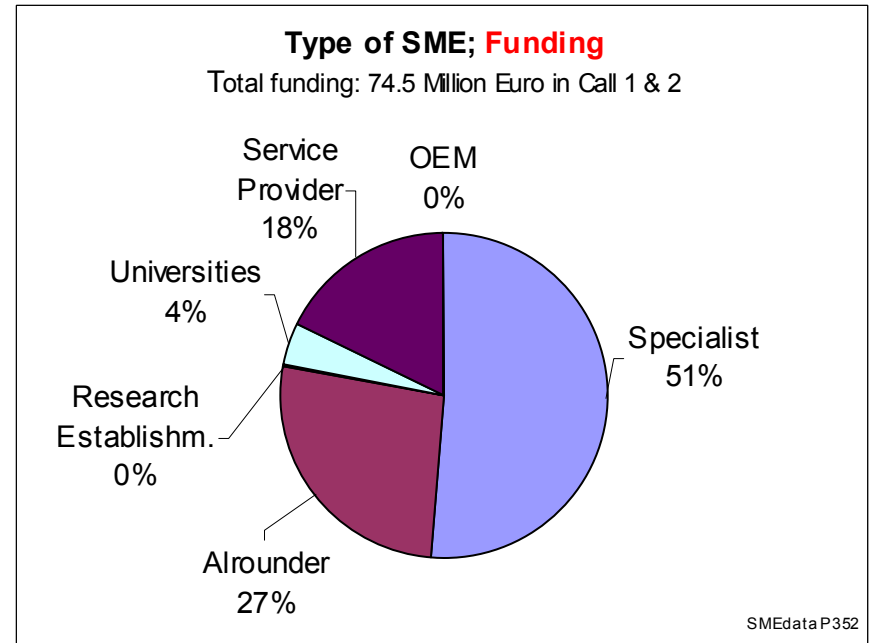
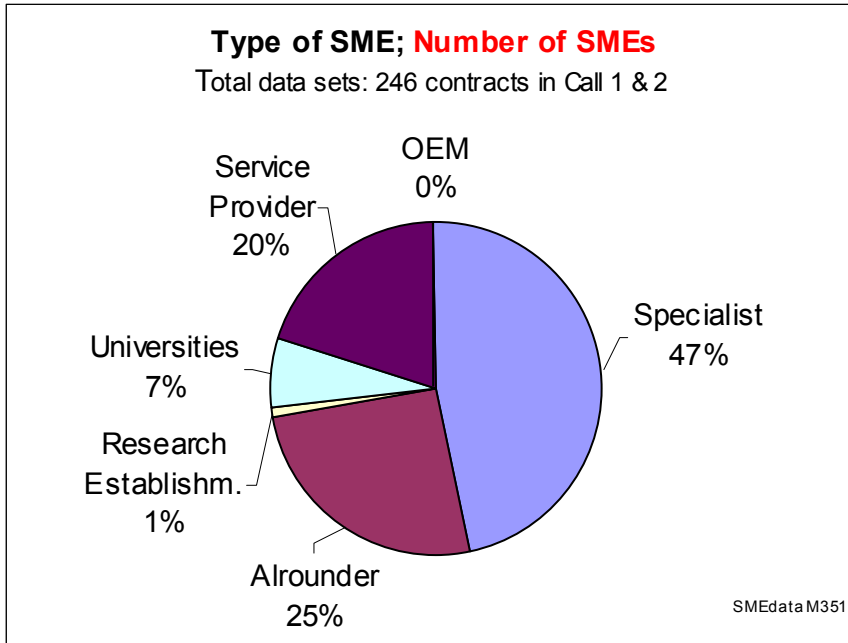
## Supply Chain Function; Funding

Total funding: 74.5 Million Euro in Call 1 & 2



SMEdataP331

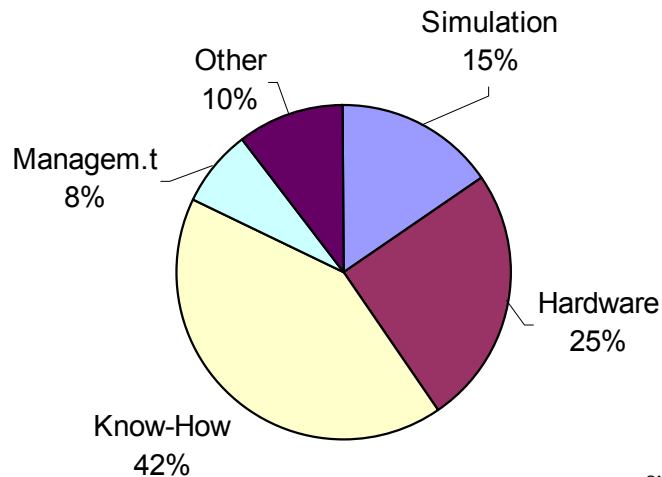
14% (4+10) of the SMEs are hardware suppliers or supply engineering services in aeronautics. Another 1/3 of the SMEs suppliers of *other* products which are needed in aeronautics but also in other industrial sectors.



About half of the SMEs offer specialist services. About a quarter are “all-rounders”. All-rounders are professionals which offer a variety services as compared to the specialist who offers a unique skill or technology.

## Product of SMEs; Number of SMEs

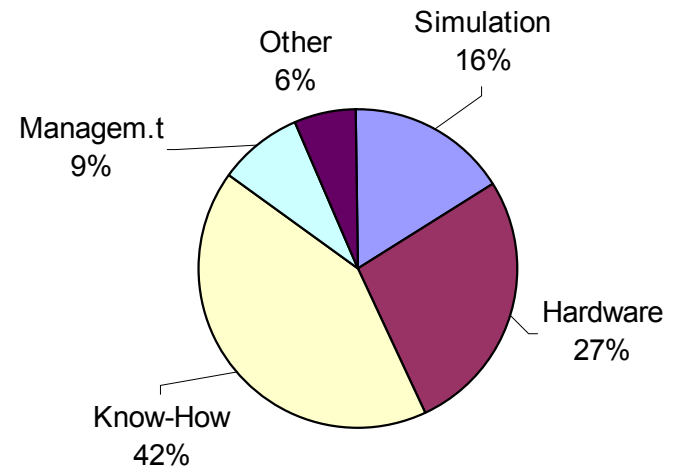
Total data sets: 246 contracts in Call 1 & 2



SMEdataL375

## Product of SMEs; Funding

Total funding: 74.5 Million Euro in Call 1 & 2



SMEdataP375

42% of SMEs offer know-how, about a quarter are hardware providers. 8% of the SMEs provide management support to aeronautical RTD projects.

**Each EU R&D project focuses on a particular topic of the EC's work programme as published with the respective Call.**

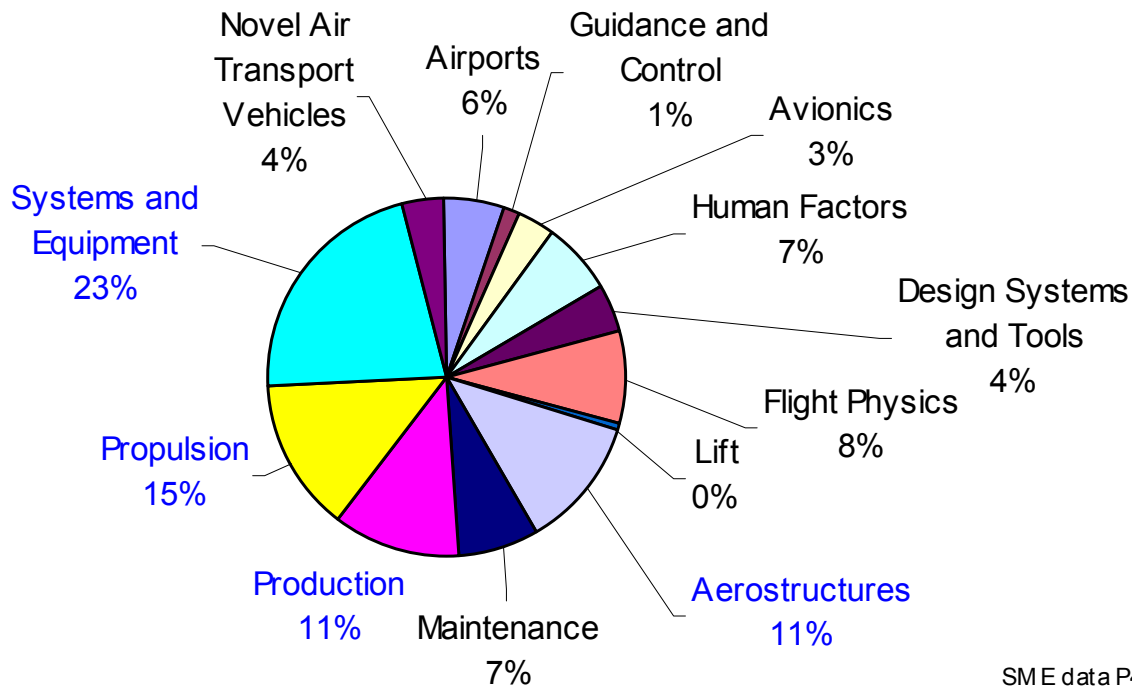
**The 246 SME participants in the successful proposal have been categorised according to topic of the work programme of "their" project.**

**The following statistics rely on the data provided by the Commission.**

Level 1 Projects

## EC Work Progr. for CP-FPs: Budget split

SME funding: 41 Million Euro in Call 1 & 2

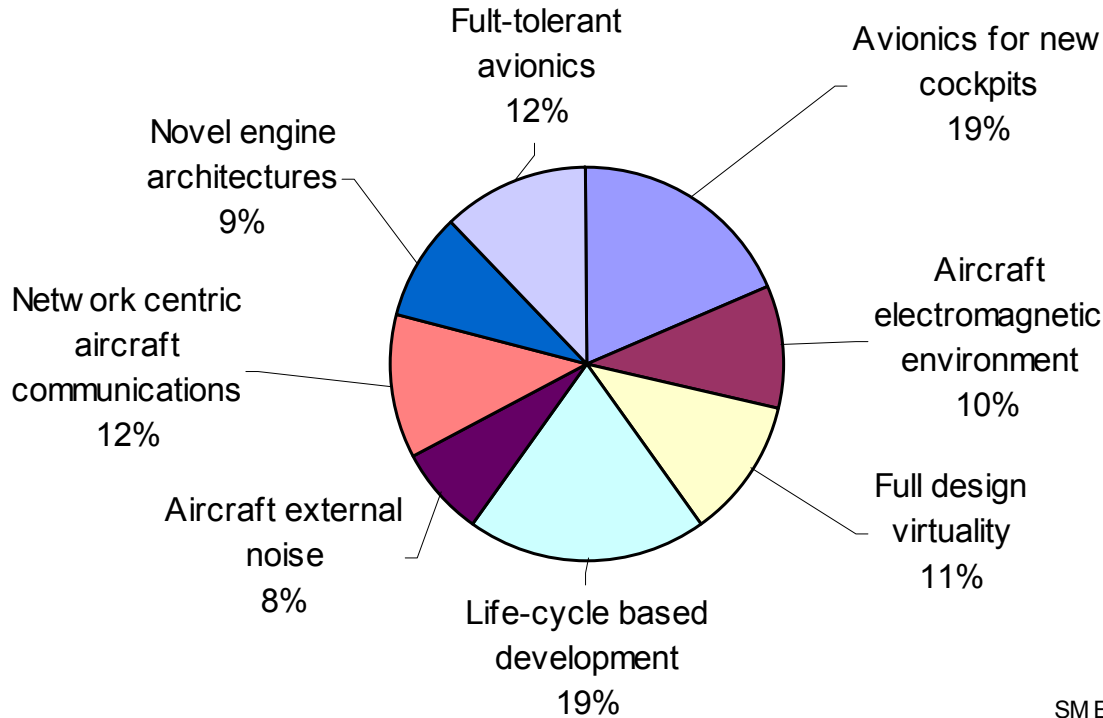


Systems & Equipment and Propulsion offer good opportunities for integrating SMEs in EU projects.

Level 2 Projects

## EC Work Progr. Selected CP-IPs - Budget split

SME funding: 31.5 Million Euro in Call 1& 2

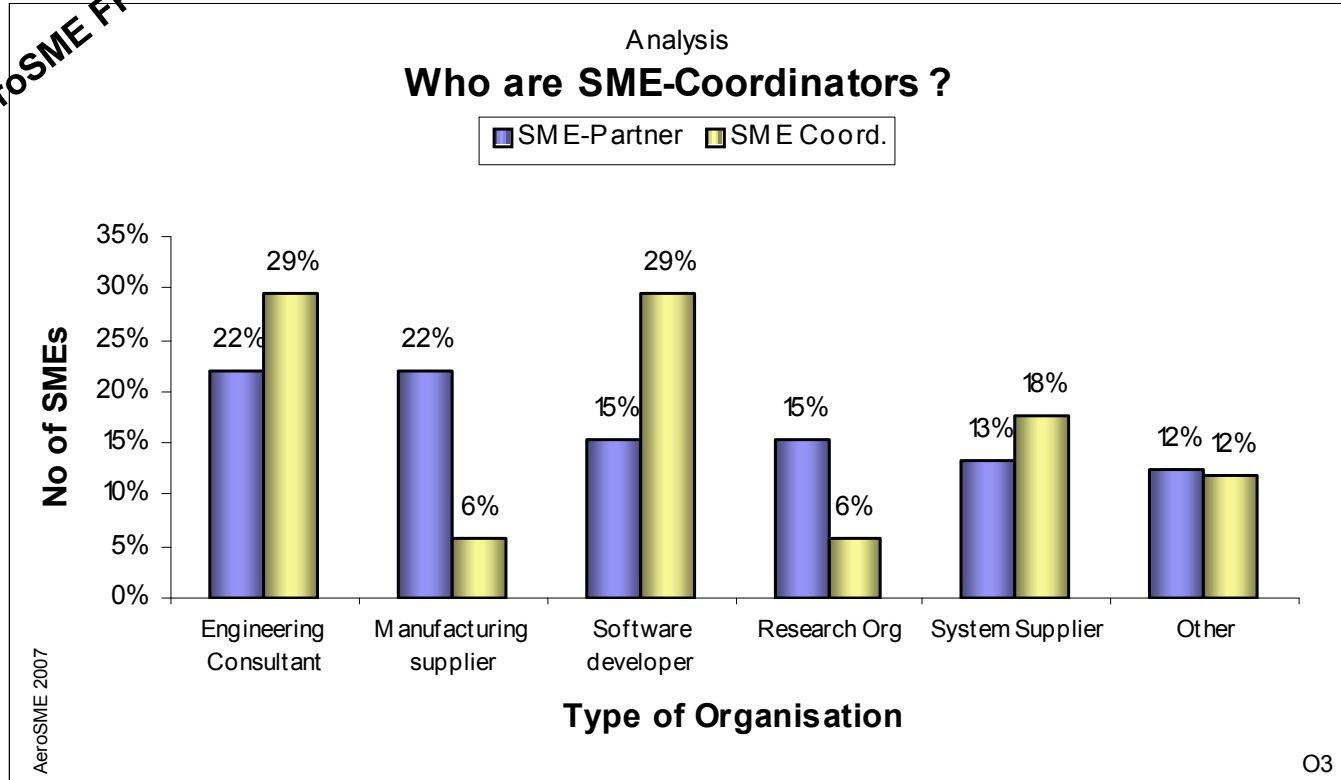


SME data P483

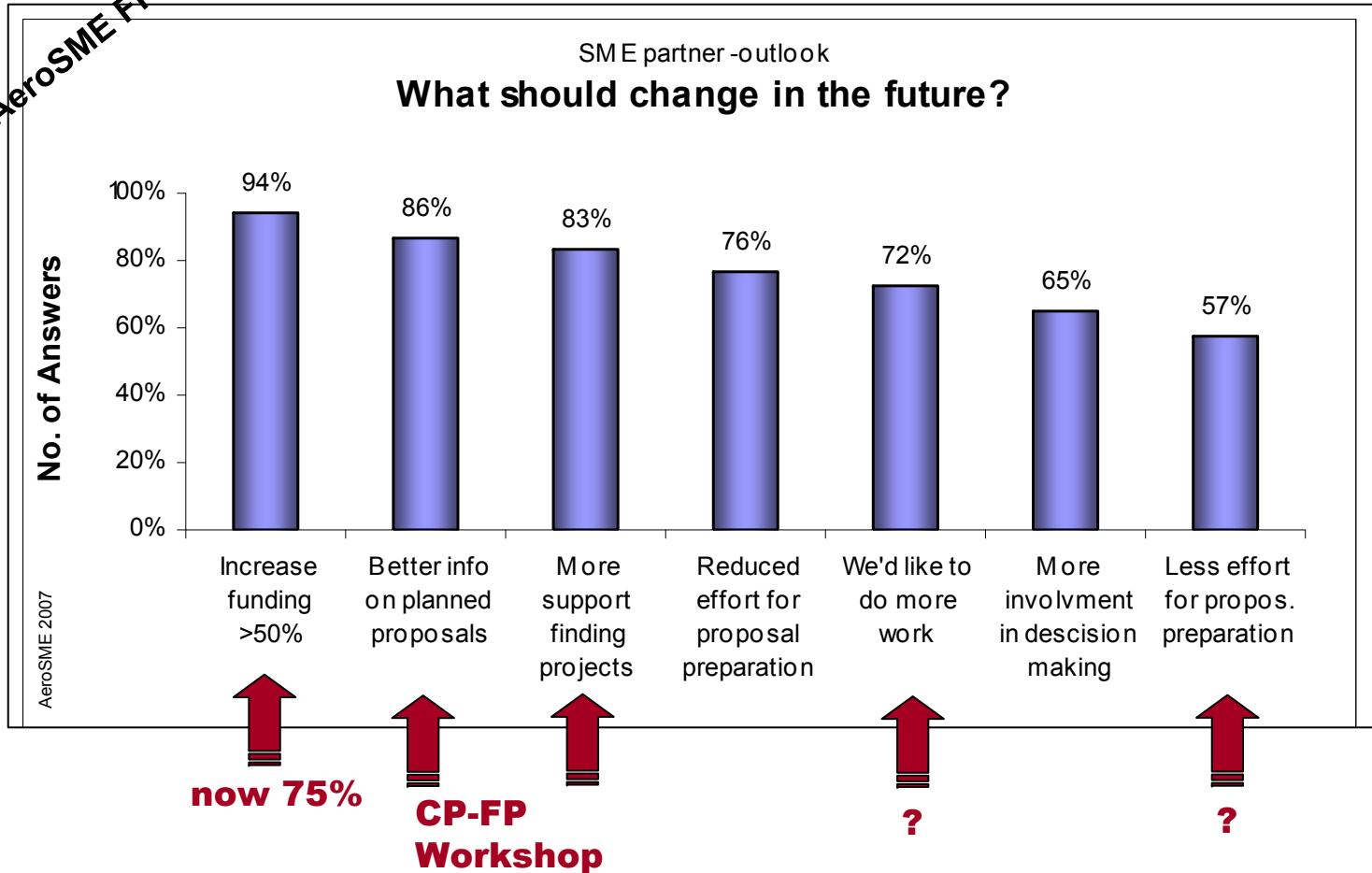
While the involvement in Avionics CP-FP (Level 1) is very low, the involvement in the Avionics related CP-IP (level 2) is surprisingly high if compared to the SME participation in CP-FP projects (see previous slide).

**The following two slides provide a short review of the some findings of the AeroSME study on FP6.**

Source: AeroSME FP6 Study



Source: AeroSME FP6 Study



**Thank you!**