



ACCESSING INTERNATIONAL MARKETS

UK Aerospace International Strategy 2010



Fast track to the world^{UK}

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EXECUTIVE SUMMARY

1. This report identifies the major opportunities for UK Aerospace in export markets and provides recommendations on how these opportunities should be approached during the next 12-18 months.
2. Over the next 10 years, the large emerging markets of China and India will drive global civil aerospace growth. The opportunities in these markets for UK aerospace companies will principally focus around the formation of partnerships and technology collaboration and it is key that the UK positions itself as a long-term strategy partner with these markets.
3. The principal opportunities in the next 10-year period are likely to be on new Boeing, Airbus, Bombardier and Embraer single aisle programmes and new market entrants such as the COMAC C919 and Irkut MS21 due to their sheer volume and the fact that there will be options for new supplier entries. There are also significant opportunities for UK suppliers to win export business on new rotorcraft, business aircraft and commercial UAS programmes.
4. The globalisation of the supply chain and current market conditions require that UK aerospace companies and UK Government co-operate even more closely than before to maintain and expand their share of this important part of the advanced engineering sector. A|D|S and UK Trade & Investment (UKTI) form an important focal point for this co-operation.
5. Successive UK Government's have recognised the importance of aerospace as a strategic sector and have been supportive in helping it to develop and grow its international civil and defence aerospace business - not least, given the high levels of support given by overseas governments to their respective aerospace & defence industries. Advanced manufacturing sectors such as aerospace and defence also continue to be seen as important to maintaining a balanced economy in the UK.
6. This document is a direct result of UKTI requiring a consolidated UK aerospace industry view of where it can best allocate its resources. A|D|S and the UK Aerospace Industry welcome the support that UKTI has given to producing this document and looks forward to continued collaboration between UKTI and A|D|S for the benefit of the UK Aerospace Industry.
7. The information contained in this report was compiled from data provided by major UK-based companies in the aerospace sector during late 2009, early 2010. It provides a consolidated view of future international opportunities and was signed off as such by A|D|S in February 2010.

INTRODUCTION

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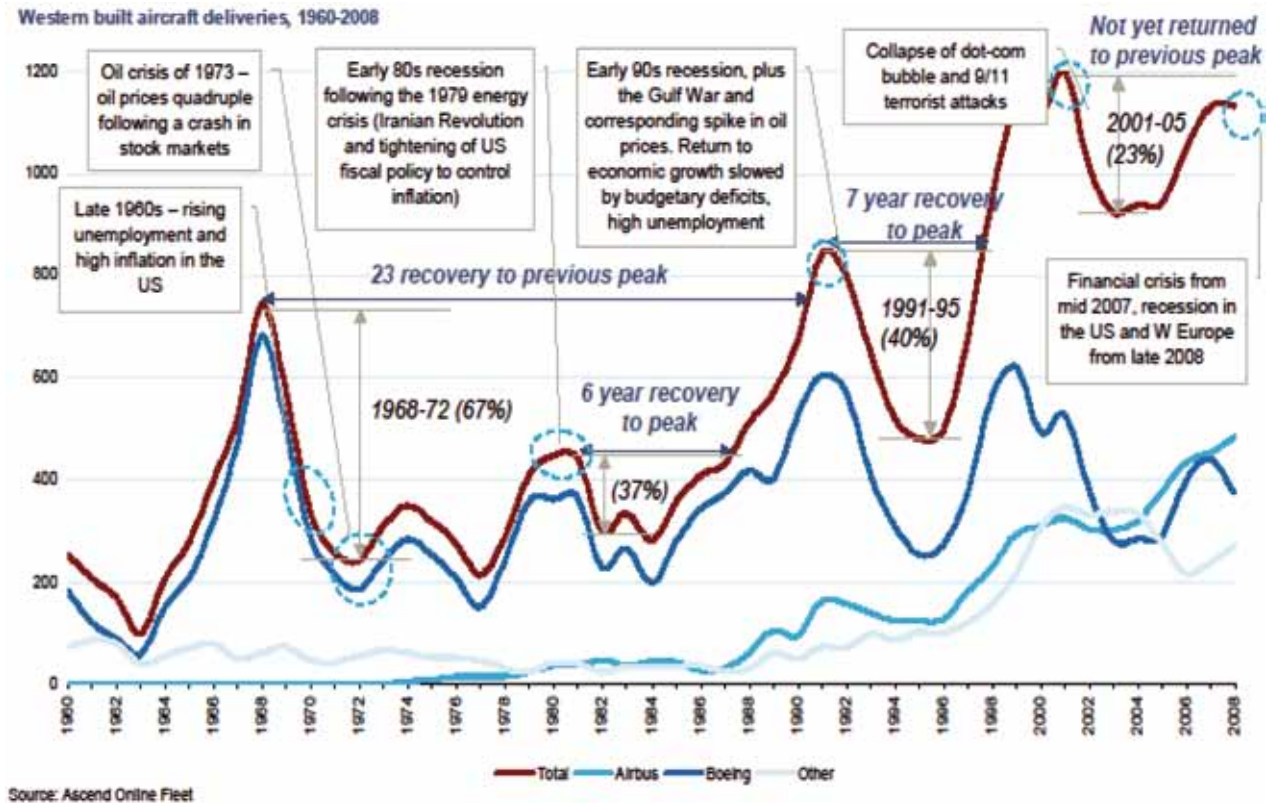
This report is an update of the strategy document that was produced in March 2009 by the then SBAC Market Development Board, which outlined the status of the worldwide marketplace, identifying key export markets for the UK aerospace sector and recommending how opportunities in these markets should be approached. This document was submitted to UKTI in support of their annual business planning process.

As a result a targeted programme of activities focusing on key aerospace opportunities has been delivered for UK companies based around the recommendations. During the past 12 months this has resulted in greater engagement in events from the UK industry than previously seen and has included trade missions to China, USA, Brazil, Canada and India and a series of well supported market and programme briefings in the UK. All of these activities have received positive feedback and significantly increased UK companies' knowledge and interest in pursuing business in these markets.

The data gathering and consolidation exercise also resulted in a comprehensive set of worldwide programme data that has been made available to the UK Aerospace Industry via the A|D|S website and through regional trade associations. This has been particularly valuable for SME companies that do not have their own in-house research teams to gather and produce this analysis. They have been able to use this data to identify which programmes offer greatest potential for their products/services and thus prioritise their marketing and business development activities. Larger companies have also been able to use this data to calibrate their own in-house market analysis and forecasts and to identify where there are differences, investigate these areas and refocus their strategy if required.

2

This new edition reflects the cyclical nature of the aerospace industry, which is demonstrated in the diagram below:



The consolidated data analysed to produce this report will be made widely available to UK industry on a request basis, along with a copy of this report summarising the key opportunities. A|D|S proposes to promote the availability of this report via its own website, its regional partners and the UKTI website. It is also proposed that a series of roadshows (one in London and the rest around the key regions) will be organised to present both the consolidated data and the recommended activity to UK industry and to allow them to ask questions about the content.

It is also intended that the UKTI Advanced Engineering Team should circulate this report to their virtual network around the world to inform the aerospace leads in each market where UK industry believes the greatest opportunities are and how they can target their activity to assist UK Industry pursue these opportunities.

OBJECTIVES

3

The primary objectives of this report are:

- To provide an evidence base to inform UKTI Advanced Engineering 2010/11 activity planning.
- To provide the UK Aerospace Industry in all areas of the supply chain and across all tiers a rich and validated evidence base on which to base future business capture activities and planning.

4

METHODOLOGY

A|D|S contracted a consultant to gather market intelligence and forecast data for key aerospace programmes from A|D|S member companies and consolidate these data to produce an industry view on global opportunities. In a workshop facilitated by the consultant the members of the Delivery Task Force (listed at **Appendix A**) analysed the summary data, generated a list of priority opportunities for the UK aerospace industry, and a list of recommended actions by A|D|S and UKTI in support of winning business in these areas.

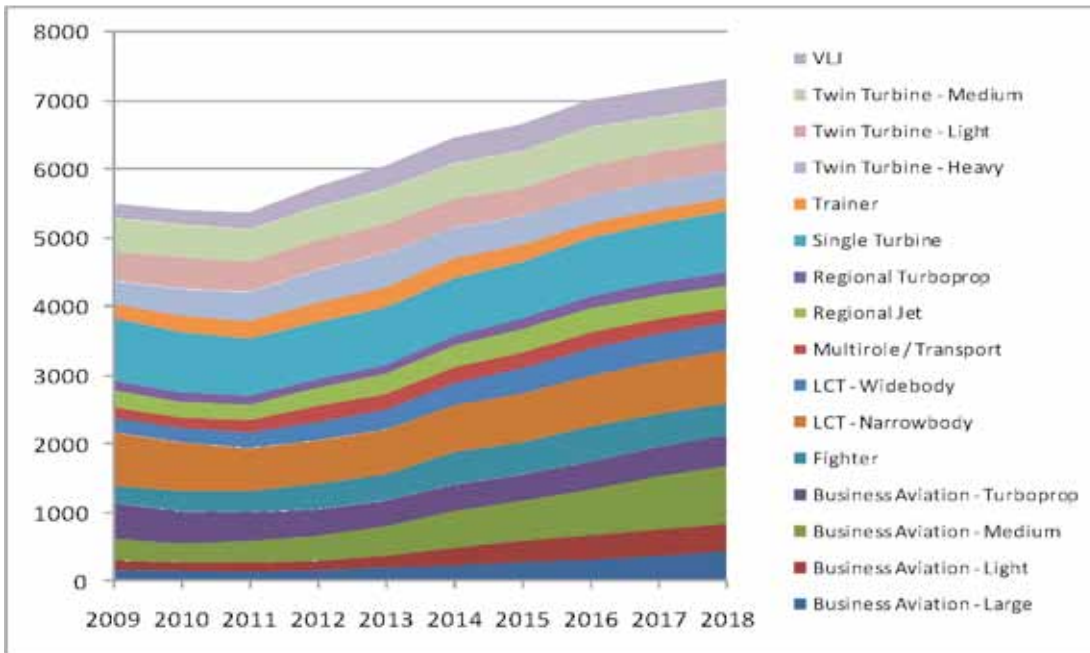
The workshop covered the following issues and was broken down into 4 phases:

- Presentation and Evaluation of Consolidated data
- Identification of Priority Programmes
- Identification of Priority Markets/Countries
- Brainstorm of Proposed Activities to help UK industry pursue identified opportunities

The consolidated data was presented by sector and the total market volume by sector and market value by sector from the data that was submitted are summarised in the charts over:

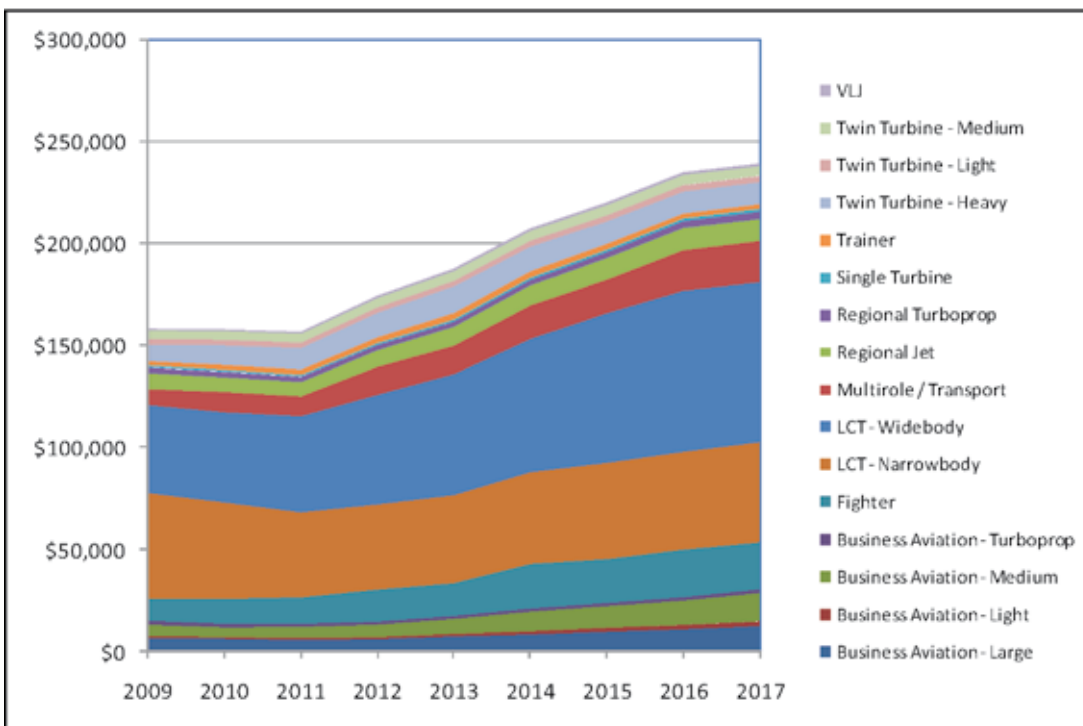
MARKET VOLUME

5



MARKET VALUE (\$M)

6



7

OPPORTUNITIES

The workshop identified a list of priority programmes that it is believed will present the greatest opportunities for UK industry during the period 2009-2019. Each of these programmes was evaluated by benefit to UK companies of securing work on these programmes versus ease of access. The criteria used for each of these categories were as follows:

Ease of Access

- Level of Investment required
- Cost to win
- Cultural skills
- Openness of supply chain – lack of incumbents
- Export/import barriers/costs
- Offsets
- Dual use
- Level of competition
- Win probability
- Product liability
- IP protection
- Access to finance
- Currency
- National support

Benefit

- Volume of Production
- Continuity of Programme
- Scope (range of opps)
- Stability of programme
- New customer access
- Margins
- No IP transfer
- Timescales

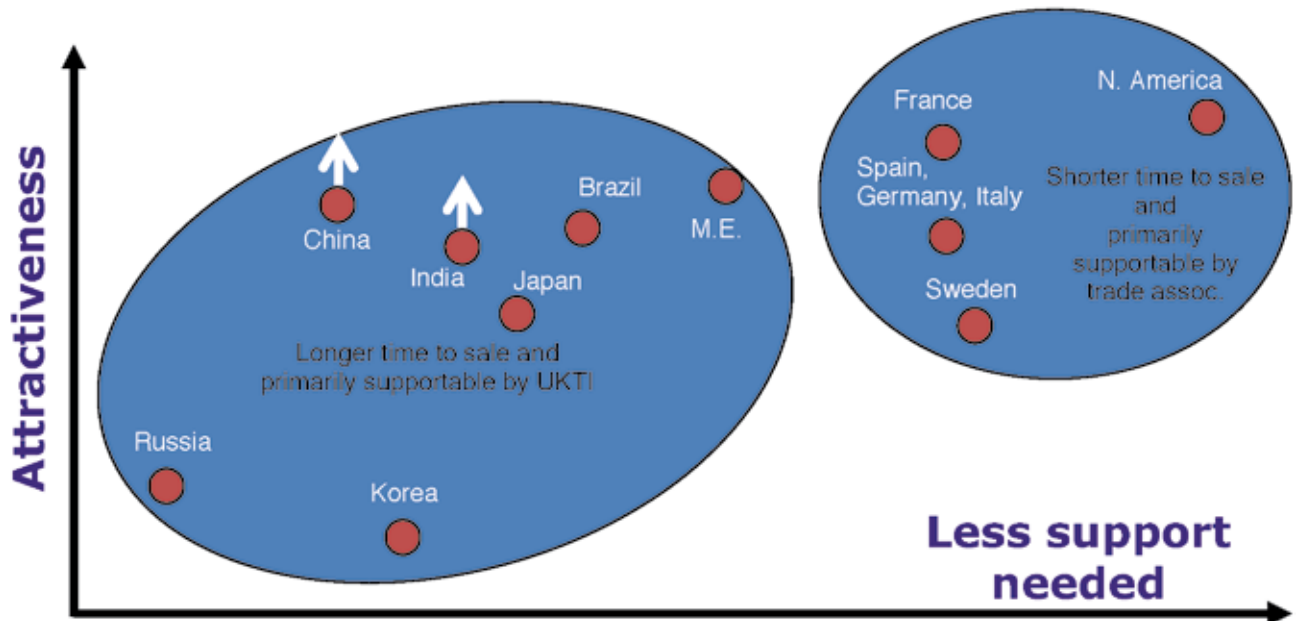
This resulted in a mapping of programmes as shown in the image below:

	Harder access	Easier access
Higher benefit	Boeing 777 Upgrade* COMAC C919 Mitsubishi MRJ Eurocopter X4* Lockheed Martin F-35 logistics chain USAF KC-X Tanker Replacement ASH Kawasaki C-X and P-1	Airbus A350 XWB Boeing 787 Bizjets Bombardier CSeries Boeing 737RS* Airbus A30X Military UAS Saab Gripen NG Agusta Westland XX9* F-35 OE/2 nd sourcing, Sovereign support Agusta Westland 101 International Embraer C390
Lower benefit	Irkut MS-21 Sukhoi Superjet Civil UAS KAH K-FX MCA MTA CH/MH-53	Boeing 747-8 Agusta Westland 149 New ATR* New Q400X*

* not launched

A similar mapping was also produced by market which resulted in two sets of markets – those that have a shorter time to sale and are therefore primarily supportable by a trade association and those that have a longer time to sale and where UKTI support can add the most value to companies business development efforts as shown in the image below:

7



A matrix showing UKTI DSO's view of end user requirements around the world is listed in Appendix B.

Fixed Wing Widebody

Airbus A350 XWB

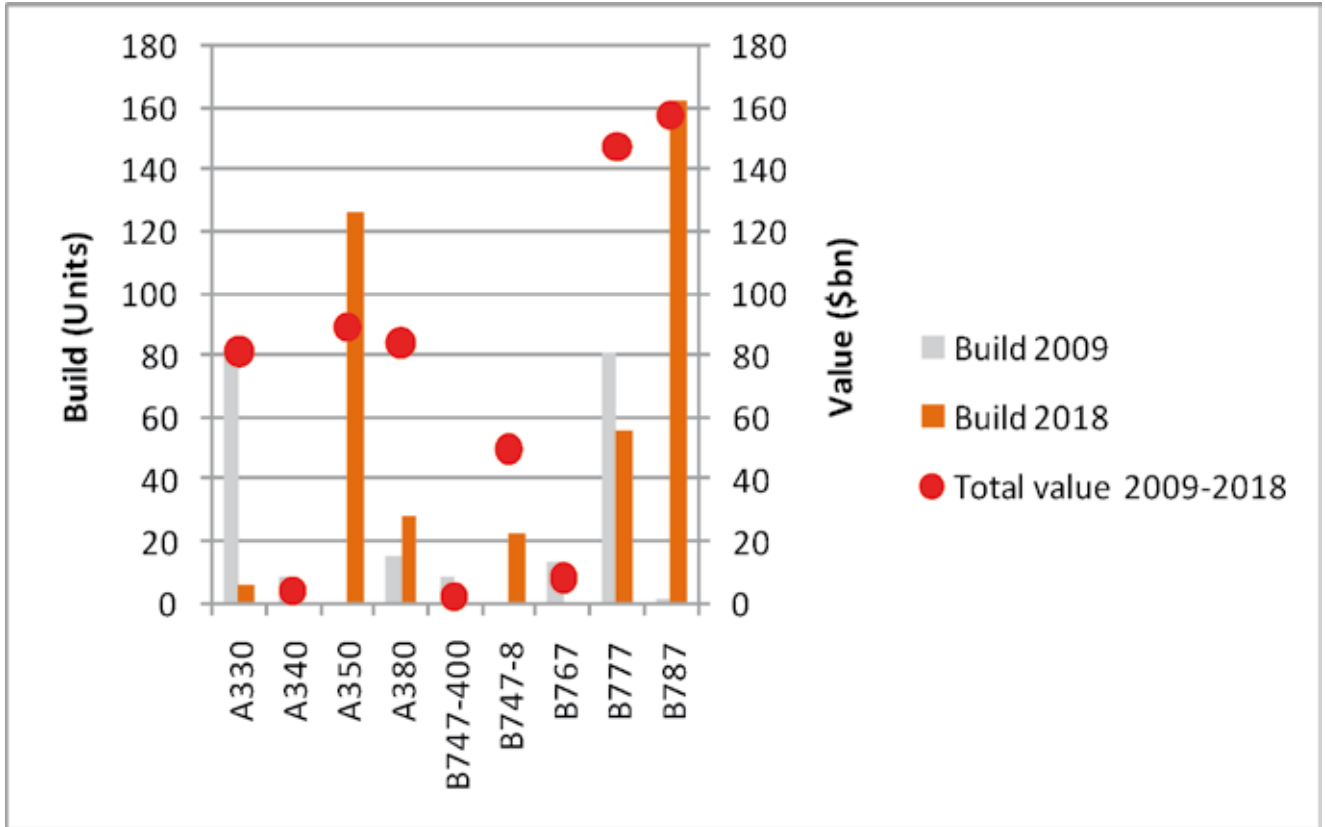
The Airbus A350 XWB design is now firmed up and the aircraft has become an attractive commercial proposition with over 500 firm orders and commitments at time of writing. Entry into Service (EIS) is scheduled for 2013. It will compete for business with Boeing's 787 and some models of the Boeing 777 for the next 20 years. The aircraft has so far only been offered with versions of the Rolls Royce Trent XWB engine.

Tier1 suppliers are now selected and signed up to the programme. Opportunities however still exist in the near term at lower tiers. A|D|S has produced a briefing paper on the A350XWB for UKTI.

Boeing 787

The Boeing 787 has had some well publicised schedule problems. The first flight took place on 15 December 2009 and Entry into Service looks likely to slip to late 2010 at the very earliest. Despite the slippages, the programme looks set to be successful with over 800 firm orders to date and Boeing's recent decision to establish a second production line in Charleston underlines their confidence in the programme. The aircraft is offered with both the Rolls Royce Trent 1000 and General Electric GEnx 2B engines.

To recover as much time as possible Boeing continues to pull work back in-house. It is possible Boeing will look to replace under performing contractors and this may be an opportunity that established and trusted UK suppliers could exploit. Nonetheless it is obvious that Boeing will be risk averse with regards to its supply chain for many years to come.



Boeing 747-8

The first aircraft has been recently rolled out and should have flown by time this is published. The passenger version has not sold well so far against the A380 but has carved out a strong niche as a freighter. The engine is the General Electric GENx-2B offering fleet commonality for some buyers of the B787.

The supply chain is already well established and there are therefore likely to be limited opportunities for the UK Aerospace Industry.

Boeing 777 developments/replacement

Scott Carson of Boeing talked about options for future programs, including a stretched 787-10, a revamped or rewinged 777, or an all-new design. Any new Boeing aircraft is likely to be comparatively accessible for UK industry. There is however no announcement and no known timescale but it is conceivable such a program could precede the now-delayed 737RS programme.

Fixed Wing Narrowbody

Boeing 737 and Airbus A320 Replacements

Boeing and Airbus continue to slip their proposed narrow-body development programmes. It now seems probable that these replacement programs may slip later than 2020 Entry Into Service. The predicted availability and or maturity of engines offering sufficient improvement in fuel economy to warrant more than a refresh of current designs has previously been the reason given, though there are clearly also other factors at work. In particular, there are signs that the existing aircraft programmes may be extended through more efficient engines. These upgrades may create opportunities for UK suppliers in the nearer term.

Notwithstanding the slippages, the two replacement programmes remain very significant and are forecast to represent more than 700 aircraft deliveries per year and a value of nearly US\$500 billion over ten years. The UK aerospace industry has the capability to supply more than 20 per cent of the value of these programmes. Global threats for the capture of this value are obvious. As yet, no engine has been selected for either programme. All three engine OEMs are currently developing technologies to satisfy Airbus and Boeing's operational requirements. Specific programmes are Pratt and Whitney 1000G Geared Turbo Fan (GTF) and the CFM Leap-X. Rolls-Royce is currently studying a range of candidate technologies. Open rotor has emerged as a contender from RR and GE/Snecma on the all new aircraft.

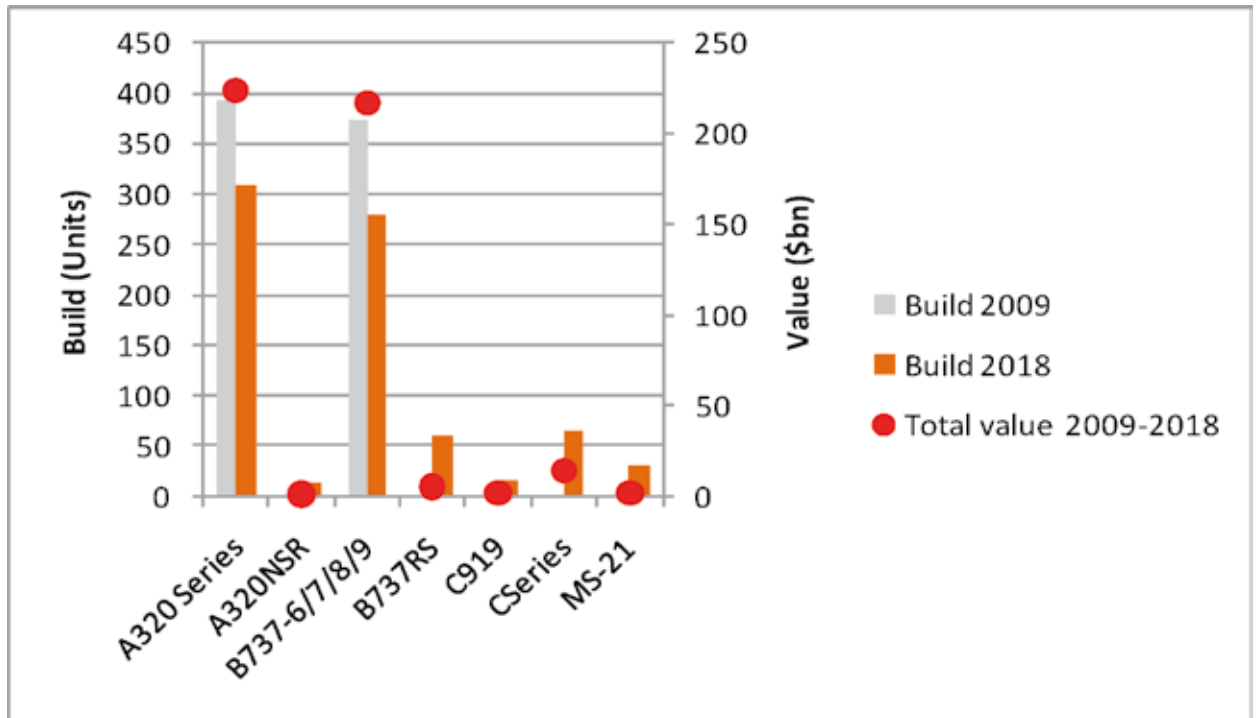
In the meantime airlines want 10-15% better fuel burn in the next five years and the prospect of re-engining the current A320/737 has continued to gather pace with the candidates being the LEAP-X and the PW1000 Geared Turbofan. If a re-engining programme took place in 2015-17 timeframe, it would leave room for a step change technology to enter service around 2025+. A decision on a re-engining programme is expected by the end of 2010.

Bombardier CSeries

Bombardier launched this programme in July 2008, and holds firm orders for 90 aircraft, and options for an additional 90, from Lufthansa, Republic Airways and Lease Corporation International. Optimised for the lower end of the 100- to 149-seat commercial market, the CSeries family of aircraft is designed to offer airlines improved economics and performance, with a reduced environmental impact. Bombardier estimates this market at 6,300 aircraft over the next 20 years, representing more than \$362 billion revenue. It expects to be able to capture up to half of this market.

CSeries, which is due to enter service in 2013, will include the latest technological advancements, such as increased use of composites and aluminium lithium in structures; a next-generation engine – the Pratt & Whitney PW1000G PurePower Engine; fly-by-wire, and advanced aerodynamics..

The advanced composite wings will be developed and manufactured at Bombardier’s Belfast facility, which has almost 40 years’ experience in composites technology. Producing the wings will further develop Belfast’s capabilities, and ties in with the UK’s wider strategic interests in aircraft wing technology. The CSeries programme is benefiting significantly the US, UK and wider European supply chains.



New Market Entrants

China and Russia both have projects for new 150 seat aircraft in the Boeing 737 and A320 market space. The programme authorities are both currently quoting very aggressive Entry into Service dates of 2015-2016. On this timescale both programmes are likely to have substantial international content.

COMAC C919

China is growing an indigenous civil aero-engine capability but it is considered unlikely to be able to do so in time to meet the Entry into Service date of this programme with an engine that would meet the demanding operational requirements of the international airline environment. China has conceded that the initial powerplants for the Commercial Aircraft Corporation of China’s (Comac) 919 are likely to be Western engines, although the country’s main aerospace conglomerate is still hoping to provide Chinese-made units as well. COMAC has selected the LEAP-X engine, which will be provided by CFM, the JV between Safran and GE. MTU, which recently opened a Shanghai office, has signed a co-operation memorandum with AVIC Commercial Aircraft Engine Company.

GE Aviation and China Aviation Industry (AVIC) plan to form a new joint venture, to be launched by mid-2010, to develop avionics systems for commercial aircraft operators. The joint venture will start by bidding on the Commercial Aircraft Corporation of China (Comac) C919 narrowbody aircraft.

At the Aviation Expo China in Beijing, Safran-GE's newly named nacelle company, Nexcelle, signed a framework agreement with AVIC Aircraft that will see the two organisations establish a joint venture in China to design and manufacture nacelles for current types and aircraft in development. At the show, Safran also signed a framework agreement with AVIC Aircraft to collaborate on the design, production, assembly and support of nacelles and landing gears.

Irkut MS21

Russia has an acknowledged shortage of advanced composite manufacturing capability which it will need to address to be successful. Russia's United Aircraft has unveiled the main system suppliers for the planned three-member MS-21 twinjet family, which will be UAC's 150 to 212-seat next-generation replacement for the Tupolev Tu-204. Contractors were selected following international tenders invited last year by airframer Irkut, which is steering the project and will act as a system integrator and expects the first aircraft to be operational by 2016.

Irkut has selected the PW 1000G PurePower engine and has already awarded supporting systems, including Russian landing gear provider Hydromash, Hamilton Sundstrand for the auxiliary power unit, Intertechnique for the fuel systems and Eaton for the hydraulics.

UK suppliers who can bring significant products with significant intellectual property in technology or processing and for which there is no credible indigenous source will continue to have opportunities to gain a position on both of these programmes. It is likely that some form of local content will be an important factor in supplier selection as these countries seek to develop their aerospace industry.

Fixed Wing Regional Jets

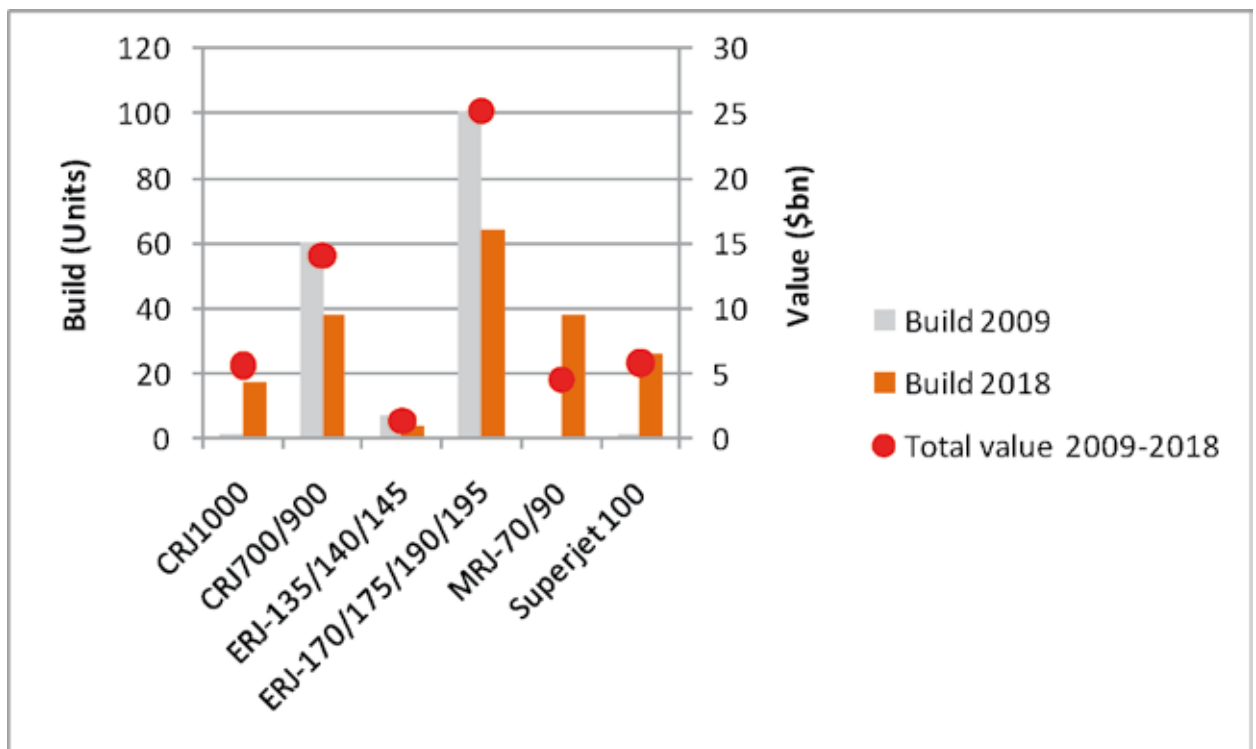
Mitsubishi Regional Jet

Officially launched at the end of Q1, 2008, this aircraft is initially aimed at the 70-90 seat segment, i.e. below the Bombardier CSeries, where it will face competition from the established large Embraer and Bombardier regional jets and, in some markets, the Chinese and Russian offerings in the segment. Again the key to market success will be a highly efficient engine, and Mitsubishi has selected a version of the Pratt & Whitney PW1217G Geared Turbo Fan. Through this linkage the success of this programme may also be tied to the success of the CSeries.

This programme is intended to develop Japan's capability in civil aerospace. The project is supported by the Japanese Ministry of Economy, Trade and Industry, which requested US\$1.4 billion from the fiscal 2008 budget to cover part of the costs for research and development. Stakes in Mitsubishi Aircraft have been taken by Toyota, Mitsui and Sumitomo. Fuji Heavy Industries is also likely to take a stake.

ANA has placed an initial order for up to 25 aircraft. Other orders have been slow to emerge, although recent success with order for 50 from Trans States in the US.

It is reported that Mitsubishi is offering in-country component manufacturing deals in its sales campaigns e.g. in Vietnam.



Sukhoi Superjet

Several prototypes are involved in the flight test programs, but EIS continues to slip. The engine is the Safran/NPO Saturn SaM146. Most other Tier 1 suppliers are French with Russian partners. Alenia now has a 20 per cent investment stake in the programme. The supply chain is perceived to be well established, but it is anticipated that this may become a family of aircraft thus presenting new opportunities.

Fixed Wing Regional Turboprops

New ATR and Bombardier Q400X

Bombardier and ATR are talking about new or stretched derivative regional turbo-props to meet expected demand in the 90 seat segment. At this stage no firm plans have been announced by either company. Embraer have also recently expressed interest in a new turbo-prop product in this segment.

Business Jets

Business Jets represent a very diverse and highly segmented part of the overall market and UK industry plays a significant role. All segments were enjoying strong growth until the global financial crisis took hold. The airframers in this segment have been hit very hard and most have been forced to make swingeing cuts in their workforce during 2009. Eclipse, one of the suppliers in the Very Light Jet segment has been forced into liquidation and generally, forecast output is down nearly 50% compared to 2008 with the Very Light Jet segment particularly hard hit. Full recovery is not expected before 2012. Nonetheless, this segment remains attractive to UK industry due to the high rate of new model introduction and the reduced barriers to change allowing incumbent suppliers to be replaced.

While the segment is currently depressed, it looks likely to generate a number of new programme opportunities in the near future which will be accessible to UK suppliers. The most attractive area for new engine developments is also in the 10,000 lb thrust Super Mid Size segment. To date, the Rolls-Royce RB282 and the Pratt & Whitney Canada PW810 have captured the new programme launches and represent key programmes for targeting. Other engine programmes still awaiting their first win are the Snecma Silvercrest and the Honeywell HTF 10,000.

Defence Programmes



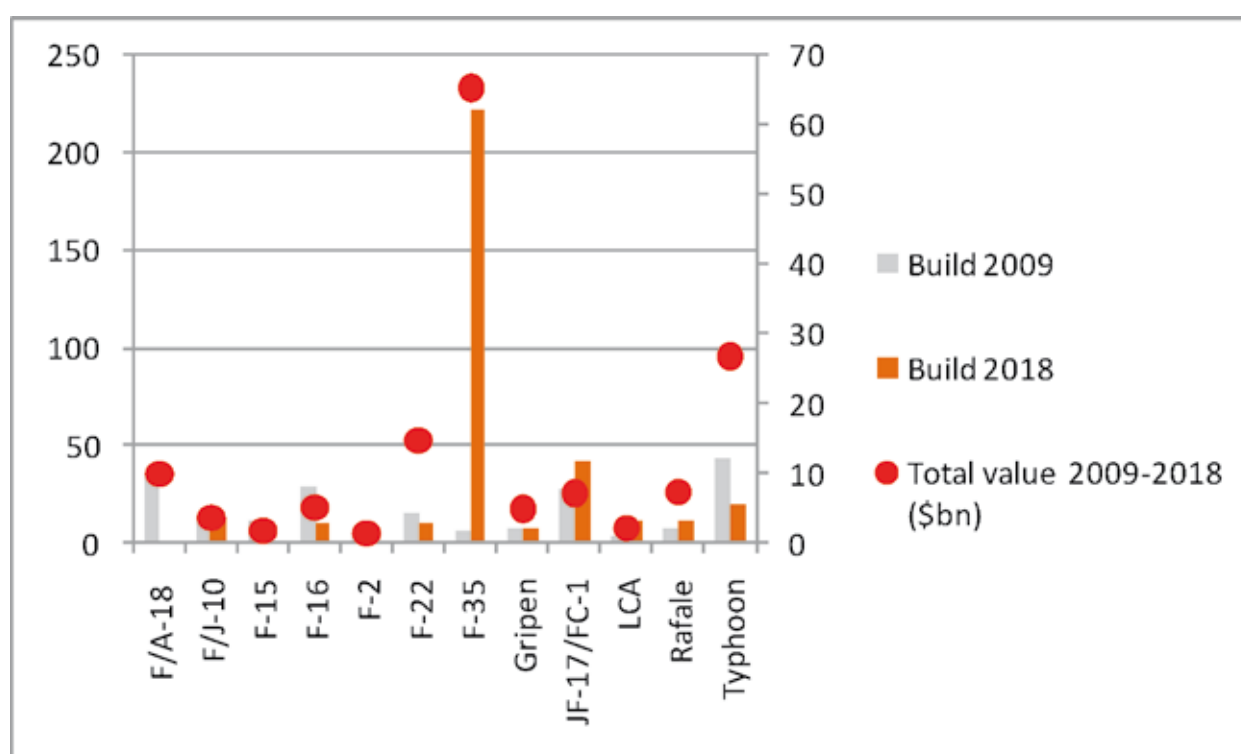
Fixed Wing Fighters

Lockheed Martin F-35 Lightning II

The Joint Strike Fighter (JSF), also known as the F-35 Lightning II, remains the largest fast military jet programme for decades to come and has already been selected by USA, the UK, Italy, Netherlands, Turkey, Canada, Australia, Denmark and Norway.

The programme is progressing in the low rate initial production (LRIP) phase, with an increased focus on rate readiness and cost target objectives. The US Department of Defence (DoD) has declared its intention to accelerate the development and production elements of the programme with ongoing support for an alternative engine option. These aspects coupled with a 2nd source policy from the Joint Programme Office (JPO) is likely to present focused opportunities in air frame and engine component supply. However, given the system maturity of the programme there are limited new equipment supply opportunities.

Additionally, there are a large number of opportunities in local logistics supply chain requirements. The global concept of the F-35 will dictate cohesive requirements to support aircraft operations, training and simulation facilities and maintenance and field support requirements. This activity, given the scale, is likely to be performance based logistics contracting which will demand providers to meet performance requirements with greater levels of the reliability and guaranteed operational availability rates. The direct opportunities for component and aircraft support is likely to be focused around the OEM and partner nation industrial providers. Whilst logistic support is a longer term opportunity driven by the international customer base it will be executed in conjunction with the OEM providers.



SAAB Gripen New Generation

SAAB is now promoting the Gripen New Generation in a number of current high-profile fighter competitions and is positioning it well to benefit in case any nations want to withdraw from JSF and as a replacement for Mirage, Russian fighters, F-5s and F-16s. Although SAAB has a well established supply chain for Gripen, it is possible that the introduction of new capabilities on the aircraft will provide new opportunities to UK industry, with which the Swedish company already has strong ties. For example, the addition of the Selex Galileo active electronically scanned array (AESA) radar has now increased the UK content of the platform to 25 per cent.

8

Indian Medium Combat Aircraft (MCA)

The Medium Combat Aircraft (MCA) project is intended to replace the Mirage 2000 and Jaguar in Indian Air Force service. A requirement for between 200–300 aircraft is foreseen.

The Aeronautical Development Agency (ADA) in Bangalore has been working on conceptual design studies since at least 2003. The project has languished since, but continues to survive. Optimistic estimates by the Defence Research and Development Organisation (DRDO) estimates have claimed the MCA could be developed in five to six years after the design is frozen, and an In-Service Date (ISD) of 2015 has been cited, which implies a government go-ahead in the next year or so at the latest. DRDO has announced that it will seek collaboration in this work from Russian, American and European companies

The Korean Fighter – Experimental (KF-X)

The Korean Fighter – Experimental (KF-X) is a development programme intended to produce a multi-role fifth-generation aircraft both to replace existing F-4Es and F-5Es in the Republic of Korea Air Force but also for wider export. Planned entry into service has frequently been given as around 2020. Although the defence budget is increasing in 2010, the amount is less than the Ministry of Defence had requested, and it is not known at present whether, or to what extent, the project will be affected by tighter funding among competing requirements. Korean Air Force requirements for KF-X have been consistently cited as about 120 aircraft. The KF-X project is run by the Korean Agency for Defence Development (ADD), and has been subject to serious questioning both on the grounds of its affordability and potential overlap with the existing fighter procurement programme. Two designs have been referred to the KFX-101 which resembles the F-22, features stealth capabilities, an internal bay and two engines and the KFX-201 which features canards, stealth capabilities, an internal bay and two engines. Other descriptions have said the KFX is expected to be roughly the size of the F-35, with performance similar to the Rafale. Stealth capabilities have been described as lower than the F-35, but higher than either Rafale or Typhoon.

The Koreans would be looking to foreign aerospace companies to provide some of the KF-X's core technology and also development costs. In November 2007, ADD said it wanted foreign firms to contribute 30 per cent of the KF-X's development costs and was considering forming separate consortiums between domestic and foreign companies on a case-by-case basis.

Fixed Wing Multirole/Transport

USAF KC-X Tanker Replacement

Following the cancellation of the contract for the Northrop Grumman/EADS KC-45A in the dying months of the Bush Administration, a new competition has begun and final bid specification will be released in late 2009 or early 2010 for this US\$35-40 billion programme which will involve an 18-month deadline to deliver a pre-production model. The contest is again between Boeing's 767 Tanker and the Northrop Grumman/EADS A330 derived Tanker. Boeing could choose to bid a tanker variant of the larger, longer range 777 but this may not meet the required timescales. Where to go and what work may be available depends on the outcome of that competition and off shore work will in any case be small as a percentage of overall programme value. The initial programme will however be a minimum of 100 aircraft and probably significantly larger. Whilst the US DoD does not want to split the contract, political support for the respective primes could lead to this result, so there is potential for business with both competitors over the long period during which the US tanker/transport fleet will be renewed.

Kawasaki C-X and XP-1

These started out as parallel development programmes with high levels of commonality to produce Japanese designed and built successors of the C-1 cargo and P3-C patrol aircraft. The development programmes have now been in progress for some time and prototypes have been produced of each aircraft.

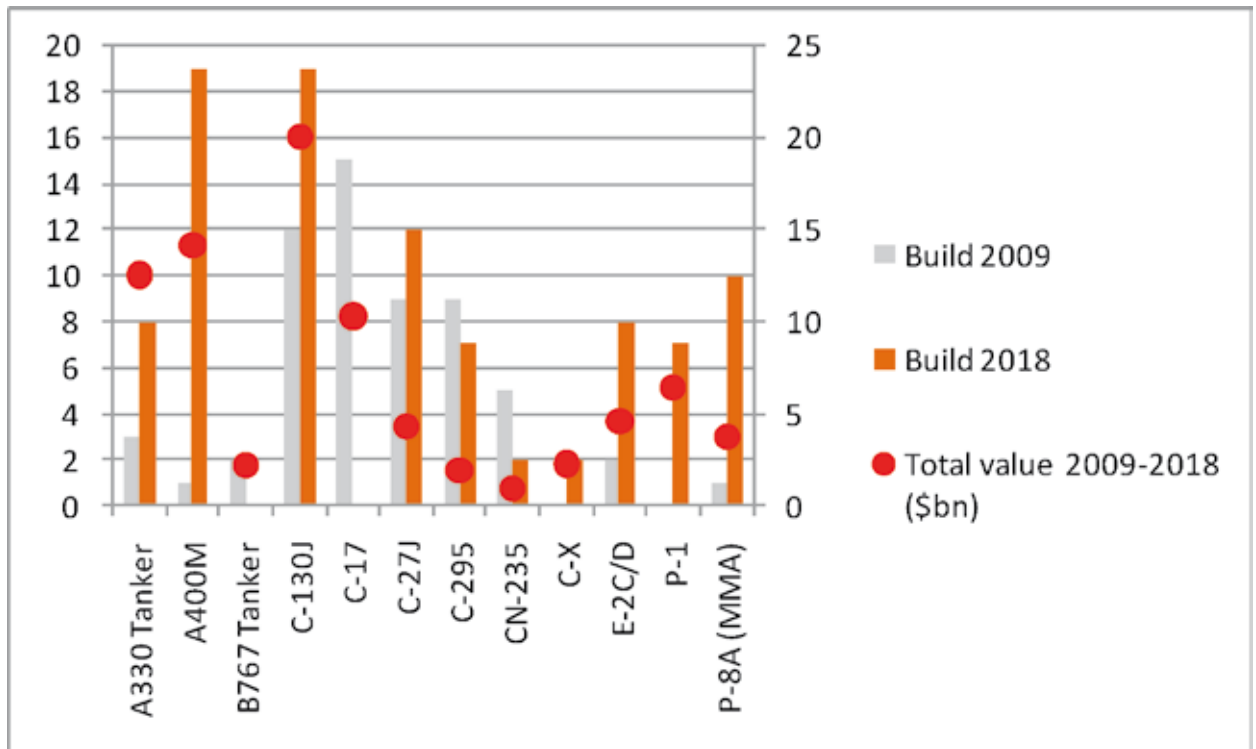
The C-X is powered by 2 current General Electric CF6-80C2. The XP-1 is powered by 2 Ishikawajima-Harima Heavy Industries (IHI) F7-10. The C-X has recently been declared as requiring significant redesign before it can go into production.

Embraer C390

The C-390 is a military transport aircraft project which has been under design as a concept since 2007, but is yet to be formally launched as the funding for its development has yet to be raised. Development is planned to take four years from launch to first delivery. The current C-390 programme schedule calls for the first flight to take place in 2013 with the first of an expected 22 aircraft being delivered to the Brazilian Air Force in 2015.

The C-390 is aimed at the replacement market for medium transport aircraft in the 5-20 tonne payload. The C-130 is seen as the primary competitor, and the new design will be faster than the Hercules, while being able to operate from the same types and lengths of runways. Embraer has identified an addressable market of 695 aircraft in 77 countries, excluding the U.S., Russia and Ukraine over the next ten years. The company intends to target 24 nations, representing about 500 aircraft.

Despite drawing from the technology of the E-190, Embraer will not necessarily use the same suppliers on the C-390 programme. The landing gear will be different and avionics are under evaluation. Embraer are considering the General Electric CF34-10E, Pratt & Whitney PW6000 and Rolls-Royce BR715 as power plant and engine selection is currently expected in 2009.



Multi-Role Transport Aircraft (MTA) (IL-214T)

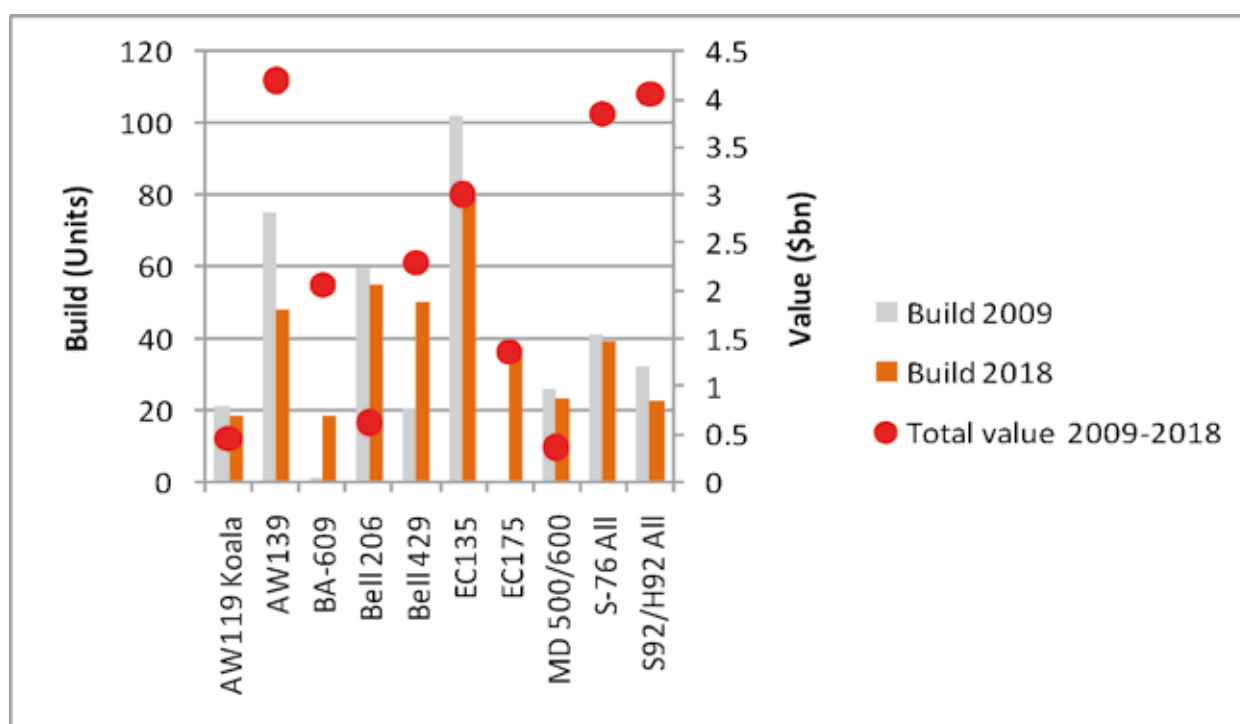
Following earlier preliminary agreements, an Indo-Russian government accord on the development and production of the Multi-role Transport Aircraft (MTA) – also referred to as the IL-214T – was signed in Moscow in November 2007. Development of the project from go-ahead to product certification has been estimated at six years, with a prototype appearing in 2010, first flight expected in 2011, and entry into service around 2015.

The aircraft will replace the Antonov An-32 in the Indian Air Force while in Russia it will serve as a replacement for the Antonov An-12, and the An-26. Both India and Russia will have their own production lines for the aircraft. Off take has been put at 100 aircraft for the Russian Air Force and 45 for India. Exports will be a key part of the programme, with the expectation of a market sized at around 350 aircraft.

Rotary Wing Programmes – Civil

Agusta Westland XX9

The AgustaWestland AW XX9 is a proposed new transport category light twin helicopter in the 4 tonne maximum gross weight class for commercial and government/military markets.



Eurocopter X4

In October 2009 Eurocopter announced that it proposed to develop a light twin to replace the Dauphin.

9

MILITARY

Agusta Westland 149

The AgustaWestland AW149 is a 7 to 8-tonne maximum gross weight twin engine helicopter that is designed to meet the most demanding requirements for military and governmental markets. The primary market is for government agencies and the aircraft will be designed to meet military qualification standards but will also be civil certified in accordance with the latest standards. The aircraft has a large cabin and will be capable of transporting 15 passengers within a standard layout with large sliding doors on each side of the cabin.

The AW149 is designed from the outset to cope with the latest operational requirements, including an ability to operate easily in hot and high, harsh conditions and day and night, all-weather, operations.

The aircraft is part way through its development and suppliers for many of the major components, including engines, have been selected. The maiden flight of the AW149 took place on November 13th. Nonetheless, there are still opportunities for component and sub-systems suppliers with AgustaWestland and its first-tier suppliers. The project office is based in Yeovil, UK.

Agusta Westland 101 international

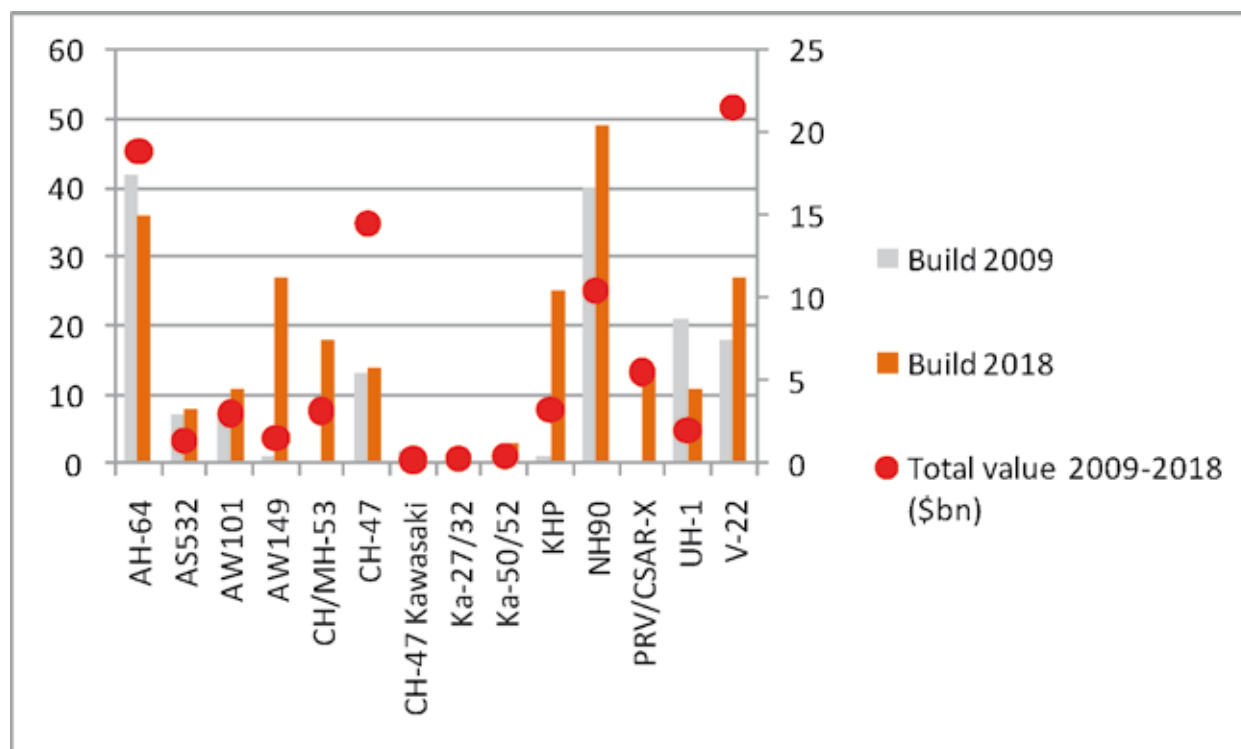
The AW 101 International is the latest variant of the AW 101 family with increased capability over earlier variants. It retains the three-engine configuration, active vibration control and marinisation of previous versions. The latest standard BERP IV blades improve payload-range and hot/high performance. It has a maximum gross weight of 16 tonnes.

The AW 101 International is being developed to meet the requirements of customers in the Utility/Transport, VVIP / Head of State and more demanding Search and Rescue (SAR) and Combat SAR roles. It offers a large cabin, unique range / endurance and good ride quality. The project office and production line is based in Yeovil, UK.

US Armed Scout Helicopter (ASH)

The Army has embarked upon a study aimed at developing requirements for a new, high-altitude Armed Aerial Scout helicopter (ASH). The program emerging from the now cancelled Armed Reconnaissance Helicopter (ARH). The platform may turn out to be an unmanned helicopter or a modified version of an existing platform.

Phase 1 of the study, being conducted by the Training and Doctrine Command Research and Analysis Centre (TRAC) at Fort Leavenworth, Kansas, US, is scheduled to be completed by spring 2010. Phase 2 of the study will come at the end of 2010, with a final report by April 2011.



CH-53K

CH-53K was first announced as a major upgrade program to the existing CH-53E in the US Marine service. This is now a new-build program for a 3-engined 32 tonne heavy helicopter.

Current activity on this program is RDT&E funding from the US DoD and the selection of suppliers for primary pieces of equipment. The US Marine service plans to procure 156 aircraft with first deliveries starting around 2015.

Export markets for this programme are small at best. Japan and Taiwan have announced a potential interest in this programme. France and Germany have a notional requirement for a helicopter in this class.

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KAH

Republic of Korea (RoK) announced a requirement for several hundred multi-purpose helicopters to be acquired under its Korea Multi-Role Helicopter Programme ('KMH'). The programme was seen as over ambitious and high risk. The project was reduced in complexity and concentrated on the indigenous development of a medium utility helicopter and re-defined as the Korea Utility Helicopter ('KUH'). Eurocopter was selected as design partner for Korea Aerospace Industries ('KAI') for this programme and development is well underway.

Originally part of the KMH, the development of an indigenous attack helicopter is now a stand-alone project known as the Korea Attack Helicopter ('KAH'). The KAH requirement is for 200+ aircraft and Korea is reviewing whether to continue the process of indigenous development using the KUH/ Surion or to establish a separate industrial collaboration with an international helicopter manufacturer, possibly adopting a similar business model as that established between AgustaWestland and TAI for the development of the T129. The RoK Army wishes the KAH to be a combat aircraft in a tandem configuration following the lines of AH-X.

Following the cancellation of the KMH the Korean Army has determined that there will be a shortfall in capability before the KAH aircraft become available. Therefore a direct procurement programme for 36 aircraft combat style and tandem configuration, designated the AH-X, has been announced. The RFP is due in mid 2010 and among the candidate platforms are re-conditioned 2nd hand Apache (ex-US Army), T129 & Tiger.

US Future Combat Search and Rescue programme

Following the intervention of the US Secretary for Defense, Robert Gates, the CSAR-X programme was terminated in 2009 and a full 'root and branch' review of CSAR provision has been commissioned. This review should be finished in 2010, with the possible resubmission of the CSAR-X programme in 2011.

Indian Helicopter Programmes

India has a dynamic defence modernisation programme and the Indian Government intends to purchase or manufacture some 600 700+ helicopters over the next 10 years. The most immediate of these is 22 attack & 12 VVIP helicopters for the Air Force and a programme for 384 light helicopters, The most immediate of these is 12 new VVIP helicopter for the Air Force, 197 new light reconnaissance and surveillance helicopters (RSH), and a development programme for 187 light observation helicopters.

Hindustan Aeronautics Limited (HAL) are proposing to develop a helicopter in the 10 to 12 tonne class, the IMRH (Indian Multi Role Helicopter) will replace the Mi-17s and the Sea Kings. The aircraft will be manufactured locally with the assistance of a Western partner.

In-country manufacture is important, a factor demonstrated by AgustaWestland's recent Memorandum of Understanding with TATA Sons to form an Indian joint venture company for the manufacture of one of its products.

Unmanned Aerial Systems (UAS)

Unlike the civil and military aircraft and rotary wing markets the unmanned systems market is still immature and rapidly evolving and there are fewer open government-funded programmes than in the manned sector, with many fielded systems originating from privately-funded R&D or through classified programmes. For this reason, it is difficult to list programmes for which there may be opportunities for SMEs. That said there is evidence and argument that the market could evolve into one that is substantial, as technological, regulatory and customer utilisation develops over time with some of the greatest opportunities arising from the need to overcome technological, regulatory and cost-effectiveness challenges.

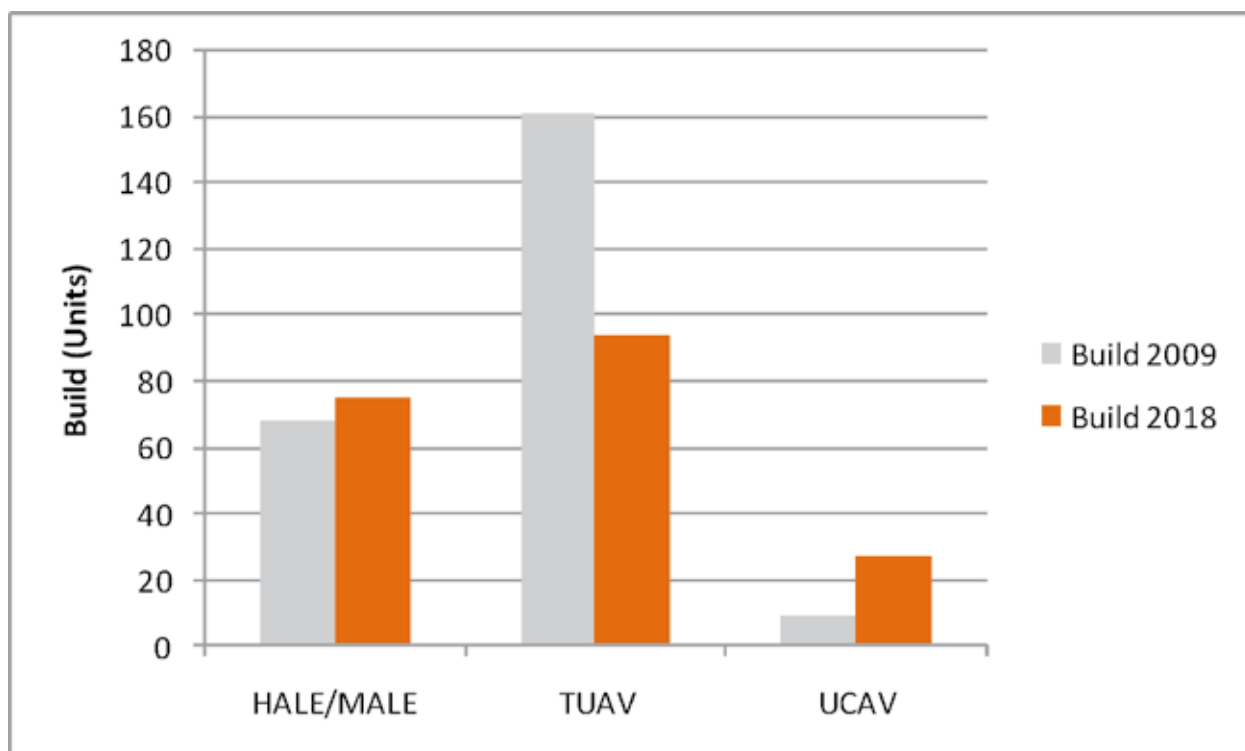
The market is currently divided into military applications, commercial applications and civil/national authority applications; and systems have so far been segmented by altitude, range and physical size. This segmentation is becoming less useful over time, and so it is likely that a new segmentation will evolve over the next few years.

Military market

The unmanned air systems market is the fastest growing segment of the military aerospace market and is the largest segment of the unmanned systems market. At present the United States is responsible for the majority of the spending on the acquisition of military unmanned systems and is the largest investor in the development of new systems by a wide margin.

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Within the market, expenditure on strategic ISTAR (Intelligence, Surveillance, Target Acquisition and Reconnaissance) systems is likely to dominate. This segment is currently seen to offer the highest operational pay-off, and the experience gained by the USA in deploying Global Hawk and the MQ-9 Predator B in Iraq and Afghanistan has demonstrated the operational effectiveness of this class of system.



The market for tactical systems represents approximately 30 per cent of the total market. According to some analysts this segment is reaching saturation point with the current generation of systems, and most analyses shows very little growth in this segment over the next decade.

Out of all the market segments, the unmanned combat air systems market is expected to be the most significant in terms of its rate of growth and value over the next decade. In the USA and, to a lesser extent, in Europe there is considerable investment being made in the development of highly specialised combat systems, but there will also be opportunities for weaponised ISTAR platforms (e.g. Predator) that have so far spearheaded the growth in this segment.

Civil/national authority & Commercial markets

There is a common belief that the potential for the civil and commercial use of unmanned air systems is substantial and could even rival current forecasts for the military market in the longer term.

The case that is made is justified with the following arguments:

- (a) For many applications unmanned systems offer operational benefits over and above comparable manned systems (e.g. persistence)
- (b) Unmanned systems are able to fulfil some roles hitherto not carried out cost-effectively by other means (e.g. telecommunications relay)
- (c) Unmanned systems are able to fulfil some roles where the risks to human health and safety may prohibit the deployment of a manned system (e.g. where there is a risk of exposure to chemical, biological, radiological or nuclear material)
- (d) The absence of a pilot in situ allows for smaller, lighter, less costly platforms, which combined with improved operational benefits, could lead to comparably lower life-cycle costs than those of manned systems
- (e) The increasing interest being shown in unmanned systems by potential civil and commercial customers is indicative of a gradual acceptance of their utility and an indicator of an underlying pent-up demand.

Whilst there is no complete estimate of the value of the world civil and commercial market, there is an emerging consensus on the way in which the market could evolve. The evidence shows that the early non-military users of unmanned systems have so far been the scientific research community and, more recently, government organisations. For example, in the United States NASA uses a small fleet of Aerosonde unmanned air systems at Wallop Island, Virginia to gather scientific research data, and it also deployed a modified military Predator B UAS from its Dryden Flight Research Centre to help firefighting efforts in California in 2007. As another example, the US department of Homeland Security Customs and Border Protection department is using a Predator B UAS system to patrol the US-Mexican border.

What makes these types of operation possible is they do not require routine access to national airspace. It is commonly agreed that this is the key challenge that will need to be met before the market will be allowed to reach its full potential.

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Routine access to national airspace poses a variety of regulatory and technological challenges; the most significant being:

- The need to develop a suitable set of regulatory frameworks for the operation of civil unmanned air system in controlled, uncontrolled and non-segregated airspace across much of the world.
- The need to develop on-board collision avoidance and airspace separation systems that are at least as effective on their own as the those that have the perceived benefit of a human in-the-loop.
- The need for protected access to telecommunications bandwidth for the control of systems and for the downloading of sensor data.
- The need to demonstrate the benefits, and safety of unmanned operations to allay public concerns regarding the overflight of populated areas.
- The need to overcome fears that unmanned aircraft could present a security risk (e.g. the use of unmanned aircraft for terrorist activities).

How these challenges are resolved (recognising that some are interdependent), will determine the eventual scope and size of the market and the rate by which it grows. When these issues will be resolved is subject to a considerable amount of debate, and depends not only on advances in technology but also on the gradual accumulation of experience by industry and the regulatory authorities. Given the progress that is being made in the UK, USA and elsewhere, it is thought that certification for routine access for some civil applications will be achieved by 2012, and that this will be extended to a wide range of commercial applications by 2015.

However, whilst overcoming the technological and regulatory challenges will create an environment whereby the civil and commercial use of unmanned systems will not be restricted, the market is unlikely to grow until it can be demonstrated that the unmanned systems are at least, if not more cost-effective than manned alternatives. This will be both a challenge and an opportunity for the UK A&D industry, as this market will require innovative solutions for lower-cost sub-systems, manufacturing techniques and business models that have hitherto not been a major concern in the military market.

Recommended UKTI/A|D|S Action by Country During the Period January 2010 – March 2011

Asia Pacific

- 1) A|D|S to organise a TAP supported UK Pavilion incorporating regional aerospace alliances and government departments at the Singapore Airshow in February 2010 to target opportunities across the Asia Pacific region.
- 2) A|D|S to organise an aerospace sector mission to Singapore and Malaysia in February 2010 to co-incide with the Singapore Airshow, working in partnership with the High Commission in Singapore and Kuala Lumpur.
- 3) A|D|S to organise a TAP supported UK Pavilion incorporating regional aerospace alliances and government departments at the Australian Airshow in March 2011 to target opportunities across the Asia Pacific region.

Brazil

- 1) UKTI Aerospace Sector/UKTI DSO teams in Brazil to maintain regular contact with Embraer and gather intelligence on new programmes (specifically the C-390) and supply opportunities and feed this back to A|D|S for dissemination to UK Industry.
- 2) UKTI to host an inward visit to the UK from Embraer in March 2010 targeting opportunities in the composite, automation and defence sectors.
- 3) UKTI to organise an outward trade mission to Brazil in October 2010 to target opportunities with Embraer and its local supply chain.

Canada

- 1) UKTI Aerospace Sector Team in Canada to maintain regular contact with Bombardier to gather intelligence on CSeries and business jet programme progress, confirmed tier 1 suppliers and opportunities for UK Aerospace Industry.
- 2) A|D|S to inform UK aerospace industry of the opportunities that exist in the CSeries programme through provision of supply chain mappings and detailed intelligence.
- 3) A|D|S to organise a UK Pavilion at Aeromart Montreal in April 2010.
- 4) UKTI Ministers, Business Ambassadors and senior officials to present the UK's advanced capabilities in primary structures, engines, avionics and systems to Bombardier when on official visits (A|D|S to provide background briefing when required).

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China

- 1) UKTI to continue to facilitate the Government to Government UK-China Aviation Working Group (AWG) with representation from A|D|S and UK aerospace industry.
- 2) UKTI Aerospace Sector Team in China to maintain regular contact with COMAC and AVIC company to gather intelligence on progress with the C919 programme and partnering opportunities for UK companies and feed this back to A|D|S for dissemination to UK Industry.
- 3) A|D|S to inform UK aerospace industry of the opportunities that exist in the C919 programme through provision of supply chain mappings and detailed intelligence.
- 4) UKTI to organise a UK roadshow on aerospace and advanced engineering opportunities in China in February/March 2010.
- 5) UKTI to organise an outward aerospace mission to China to target supply chain and partnering opportunities to coincide with the Aviation Working Group and Advanced Engineering Showcase event in June 2010.
- 6) A|D|S to consider setting up a representative office for the UK Aerospace Industry in China.
- 7) A|D|S/UKTI to consider a presence at Airshow China in Zhuhai in November 2010 to promote UK Aerospace Industry.
- 8) ADS to lead a UKTI funded familiarisation mission of UK Aerospace Alliance CEOs to China in April 2010 to look at opportunities in the Chinese aerospace sector.

Europe

- 1) UKTI Aerospace Sector Teams in France, Germany, Italy and Spain to build links with Original Equipment Manufacturers (OEMs) in the commercial aircraft and business jet sector in order to gather intelligence on new programme development timescales and potential opportunities for UK aerospace industry.
- 2) A|D|S to inform UK aerospace industry of the opportunities that exist in European programmes through provision of supply chain mappings and detailed intelligence e.g. A350.
- 3) A|D|S and UKTI to work jointly to co-ordinate a programme of networking opportunities for UK Aerospace Industry at the Farnborough International Airshow 2010 to include the UK Village Dinner and networking events with visiting delegations including Japan, China, India, Brazil, Canada and USA.
- 4) UKTI, with support from A|D|S, to co-ordinate a programme of civil delegation visits to the Farnborough Airshow in July 2010 to include delegates from China, Russia, India, Brazil and South Korea.

- 5) UKTI to support the proposed Meet the Buyer Event at Farnborough International Airshow to ensure UK company participation.
- 6) A|D|S to organise a TAP supported UK Pavilion at Aeromart Toulouse in December 2010.
- 7) A|D|S to organise a further Agusta Westland Rotary Aircraft Day to brief UK companies on opportunities in the civil rotary wing sector.
- 8) A|D|S to organise a Eurocopter rotary aircraft briefing day to brief UK companies on future Eurocopter programmes and supply chain opportunities.
- 9) UKTI Ministers, Business Ambassadors and senior officials to present the UK's advanced capabilities in primary structures, engines, avionics and systems to appropriate aerospace primes when on official visits (A|D|S to provide background briefing when required).
- 10) UKTI to organise an inward mission from the Spanish UAS Sector in January 2010.
- 11) A|D|S to organise a TAP supported UK Pavilion at the International Suppliers Conference at the Berlin Airshow in June 2010.

India

- 1) UKTI Aerospace Sector/UKTI DSO and Advanced Engineering Representative Office teams in India to maintain regular contact with HAL and gather intelligence on supply chain opportunities and development with the proposed MCA and MTA programmes and feed this back to A|D|S for dissemination to UK Industry.
- 2) A|D|S to organise a TAP supported UK Pavilion incorporating regional aerospace alliances and government departments at Aero India in February 2011.
- 3) UKTI to organise an aerospace sector trade mission to India in May 2010..

Japan

- 1) UKTI Aerospace Sector Team in Japan to maintain regular contact with Mitsubishi and Kawasaki and gather intelligence on MRJ, C-X and P-X programme progress and confirmed tier 1 suppliers and feed this back to A|D|S for dissemination to UK Industry.
- 2) UKTI DSO team in Japan to keep an eye on emerging technology demonstrator programmes such as the Advanced Technology Demonstrator (ATD-X) Shinshin and the TRDI Unmanned Aircraft Research System Technology Demonstrator and HALE UAS and provide intelligence to A|D|S for dissemination to UK Industry.
- 3) A|D|S to maintain strong relationships with SJAC and organise joint activities to encourage networking and partnerships between UK and Japanese companies.

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South Korea

- 1) UKTI to organise an aerospace sector mission to South Korea in February 2010.
- 2) UKTI DSO to keep a watching brief on the Korean Fighter Experimental (KF-X) programme and provide intelligence to A|D|S for dissemination to UK Industry.

Middle East

- 1) UKTI Aerospace Sector Teams in Middle East to build links with key MRO and service companies to gather intelligence on potential opportunities for UK aerospace industry and feed this back to A|D|S for dissemination to UK industry.
- 2) A|D|S and UKTI/DSO to organise a joint chalet at the Bahrain Airshow in January 2010 to promote UK Aerospace Industry and provide hospitality facilities for UK companies that are unable to take their own chalet presence.
- 3) A|D|S to consider setting up an advanced engineering representative office for the UK Aerospace Industry in the Middle East.

Russia

- 1) UKTI Aerospace Sector Team in Russia to maintain regular contact with United Aircraft Corporation and its subsidiary companies and gather intelligence on new programmes such as the MS21 and supply opportunities and feed this back to A|D|S for dissemination to UK Industry.
- 2) UKTI to organise a United Aircraft Corporation roadshow in the UK to brief UK Industry on opportunities in the Russian Aerospace sector and their procurement processes.
- 3) UKTI to fund a targeted trade mission to United Aircraft Corporation and its subsidiaries in March 2010.

USA

- 1) UKTI Aerospace Sector Team in USA to build links with OEMs in the commercial aircraft and business jet sector in order to gather intelligence on new programme development timescales and potential opportunities for UK aerospace industry.
- 2) A|D|S to inform UK aerospace industry of the opportunities that exist in US programmes through provision of supply chain mappings and detailed intelligence e.g. 737 replacement.
- 3) UKTI Ministers, Business Ambassadors and senior officials to present the UK's advanced capabilities in primary structures, engines, avionics and systems to appropriate aerospace primes when on official visits (A|D|S to provide background briefing when required).
- 4) UKTI to organise an aerospace sector trade mission to Seattle in February 2010 to co-incide with the Pacific North West Aerospace Alliance Annual Conference.
- 5) UKTI to organise an aerospace sector trade mission to Wichita to focus on business jet OEM's and opportunities in January 2011.

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CONCLUSIONS

Despite the current economic climate, the aerospace industry remains comparatively resilient and this document identifies a significant number of opportunities overseas for the UK Aerospace industry. Given the international competitive environment support from Government and trade associations for SMEs' business development activities remain as important in the coming year. Without support, SMEs will most likely be unaware of many of the opportunities and unable to pursue effectively.

A|D|S and UKTI should continue to work together to monitor progress on delivering the recommendations and to regularly review the strategy as the market environment changes. It is proposed that this is carried out through regular meetings of the Market Development Board Delivery Group with UKTI involvement.

APPENDIX A – INDUSTRY WORKING GROUP

APPENDIX A

David Scotter	A D S
Clive Lewis	Achieving the Difference LLP
Jim Gilhooly	Agusta Westland
Graham Copland	BAE Systems
Ricky Moroni	BIS
Richard Apps	Counter Point Market Intelligence Ltd
Phil Williams	Daher Aerospace
Mike Lee	Doncasters
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Jon White	GE Aviation
Frank Bamford	GKN Aerospace
Peter Lindop	Goodrich
Martin Phillips	Goodrich
Anthony Barlow	MAA
Richard Evans	Rolls Royce
Steve Murray	Selex Galileo
Kevin Gaughan	Thales Group
Neil Semple	UKTI
John Watson	UKTI DSO

APPENDIX
B

MAJOR DEFENCE AEROSPACE END USER REQUIREMENTS

REGION / COUNTRY	COMBAT AC	TRAINING AC	TRANSPORT AC	MARITIME PATROL AC	SPECIAL MISSION AC	ATTACK HELO	LIGHT / RECCE HELO	UTILITY HELO	MARITIME HELO	UAV
ASIA-PACIFIC										
Australia	F-35									
Brunei										
India	MMRCA				AEW & tanker					
Indonesia	Su-27/30					Mi-35				
Japan					AEW & tanker (Boeing 767)					
Malaysia					AEW					
New Zealand										
Pakistan										
Philippines	Long-term									
Republic of Korea	F-15 & KF-X		Long-term		Tanker - long-term	Long-term				
Singapore	Long-term	M346 or T-50	Long-term					Long-term		
Thailand	Gripen									
Vietnam	Long-term									
MIDDLE EAST										
Algeria		Yak-130								
Bahrain		Hawk								
Israel	F-35									
Kuwait	Long-term									
Libya										
Morocco										
Oman										
Qatar										
Saudi Arabia	F-15S	Hawk								
UAE	Rafale	M-346 or T-50			AEW					

Note: Cells Highlighted in Light Blue indicate existing potential for requirements, where projects are known they are listed.

APPENDIX B

MAJOR DEFENCE AEROSPACE END USER REQUIREMENTS

REGION / COUNTRY	COMBAT AC	TRAINING AC	TRANSPORT AC	MARITIME PATROL AC	SPECIAL MISSION AC	ATTACK HELO	LIGHT / RECCE HELO	UTILITY HELO	MARITIME HELO	UAV
EUROPE										
Baltic States	Long-term									
Belgium	Long-term									
Bulgaria										
Croatia										
Czech Republic										
Denmark										
Finland	Long-term				Tanker – Long-term					
France					Tanker			Long-term		
Germany							Training	Long-term		
Greece										
Italy	F-35				AEW & more tankers – Long-term					
Netherlands										
Norway					Tanker – Long-term					
Poland					Tanker – Long-term					
Romania			Long-term					Long-term		
Slovenia	Long-term									
Sweden					Tanker – Long-term					
Switzerland										
Turkey	F-35 – Long-term	Indigenous project			C2					

Note: Cells Highlighted in Light Blue indicate existing potential for requirements, where projects are known they are listed.

APPENDIX
B

MAJOR DEFENCE AEROSPACE END USER REQUIREMENTS

REGION / COUNTRY	COMBAT AC	TRAINING AC	TRANSPORT AC	MARITIME PATROL AC	SPECIAL MISSION AC	ATTACK HELO	LIGHT / RECCE HELO	UTILITY HELO	MARITIME HELO	UAV
NORTH AMERICA										
Canada	Long-term									
USA	LRS - Long-term	T-38 replacement - Long-term	C-130 & C-5 replacement -Long-term		Tanker ACS		ARH	CSAR CH-53K AMT		
SOUTH AMERICA										
Brazil	F-X2		CT-X (C-212) C-390 project		Tanker - Long-term			CH-X		
Chile		Long-term indigenous development			KC-135					
Dominican Republic		Tucano								
Ecuador	Long-term									

Note: Cells Highlighted in Light Blue indicate existing potential for requirements, where projects are known they are listed.

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Funded by
UK Government

A range of UK Government support is available from a portfolio of initiatives called Solutions for Business (SfB). The “solutions” are available to qualifying businesses, and cover everything from investment and grants through to specialist advice, collaborations and partnerships.

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We also help overseas companies bring their high quality investment to the UK’s dynamic economy – acknowledged as Europe’s best place from which to succeed in global business.

UK Trade & Investment offers expertise and contacts through its extensive network of specialists in the UK, and in British embassies and other diplomatic offices around the world. We provide companies with the tools they require to be competitive on the world stage.

For further information please visit www.uktradeinvest.gov.uk or telephone +44 (0)20 7215 800 0.

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