



SWISS AEROSPACE CLUSTER

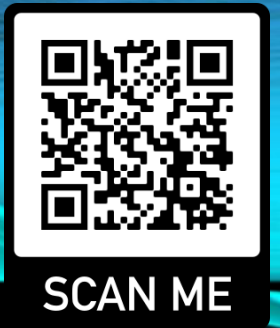
#bettertogether



Cluster Office



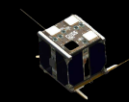
Ronny Schreiter
President





LARGEST AEROSPACE NETWORK IN SWITZERLAND

- ~170 Member Corporations / Organisations
- Focused on **Small-/Medium-Sized Enterprises & Start-ups**
- **Supported by OEM | Tier 1 | Tier 2 | Service Providers**
 - RUAG, LEONARDO / KOPTER
 - SKYGUIDE, CAPGEMINI
 - HENSOLDT, BOSSARD, RÖSLER
 - ESA, BEYOND GRAVITY
- Direct Access to **Supply Chain / Engineering & Business Services**



Cluster Office @ University of St. Gallen



University of St. Gallen
Center for Aviation and Space Competence





Extended Scope & Team since 2021:

- Innovation in Space
- System Design
- Space Policy Research
- Executive Education



University of St. Gallen

Center for Aviation and Space Competence*

*Industry Center Rebrand
since January 2023*

* Founded in 2005 as the first Industry Center at the University of St. Gallen



Certificate of Advanced Studies in Aviation Accountability, Safety and Compliance Management ASCM-HSG

Accountable Aviation Management

International Management and Leadership Module (Singapore)

Safety and Security Management Module

Auditing in Aviation Module

Join the #1 business programme for the New Space economy in Europe



**SPACE FOR
BUSINESS**



Diploma Program in Global Air Transport Management

HSG Diploma of Advanced Studies



Sustainable Aviation Management CAS

We train responsible leaders of tomorrow

VERY ACTIVE COMMUNITY LANDSCAPE

- **5 Working Groups**

- PRODUCTION & MAINTENANCE
- HELICOPTERS & VTOL
- DRONES & UAS
- SPACE TECHNOLOGIES
- R&D AND PROCESSES*

- **Dedicated WG Chairs**

- **Mike Carstensen** (generativ)
- **Christoph Wiedmann** (CRAB Analytics)
- **Jannik Pötzl** (Mecaplex)
- **Wolfgang Rieder** (Innovation Park Biel)
- **Miroslav Pantaleev** (Beyond Gravity)

- **Conference & Networking Platforms**

- **AEROSPACE INNOVATION DAYS**
 - SYMPOSIUM AIR MOBILITY (SAM)
 - AVIATION & SPACE SYMPOSIUM
 - ROTORS SWITZERLAND
 - COMMERCIAL SPACE DAYS
- Bodensee Aerospace Meeting (BAM)



CLUSTER OFFICE



**Dr. Marc-Andre
Chavy-Macdonald**
Cluster Officer;
Memberships and
Marketing



**Alessandro
Buchmann**
Communications
and Events



Susanna Steiner
Administrative
Support &
Accounting

200 **HELI20 (Näfels)**
 110 **SAM20 (Luzern)**
 200 **AS21 (Virtual)**
 250 **SAM21 (Luzern)**
 280 **ROTORS22 (Payerne)**
 320 **AS22 + BAM22 (St. Gallen)**
 520 **CSD23 (Luzern)**
200 **AS24 (St. Gallen)**
>2'000 Participants

3 New Event Brands:



ROTORS SWITZERLAND
 Helicopters | Drones | VTOL



Symposium Air Mobility
 Urban | Air | Space Technologies

2020 - 2024

5 Years in Numbers...

Cluster Office & Event Team



Dr. Marc-Andre Chavy-Macdonald
 Cluster Officer;
 Memberships and Marketing



Alessandro Buchmann
 Communications
 and Events

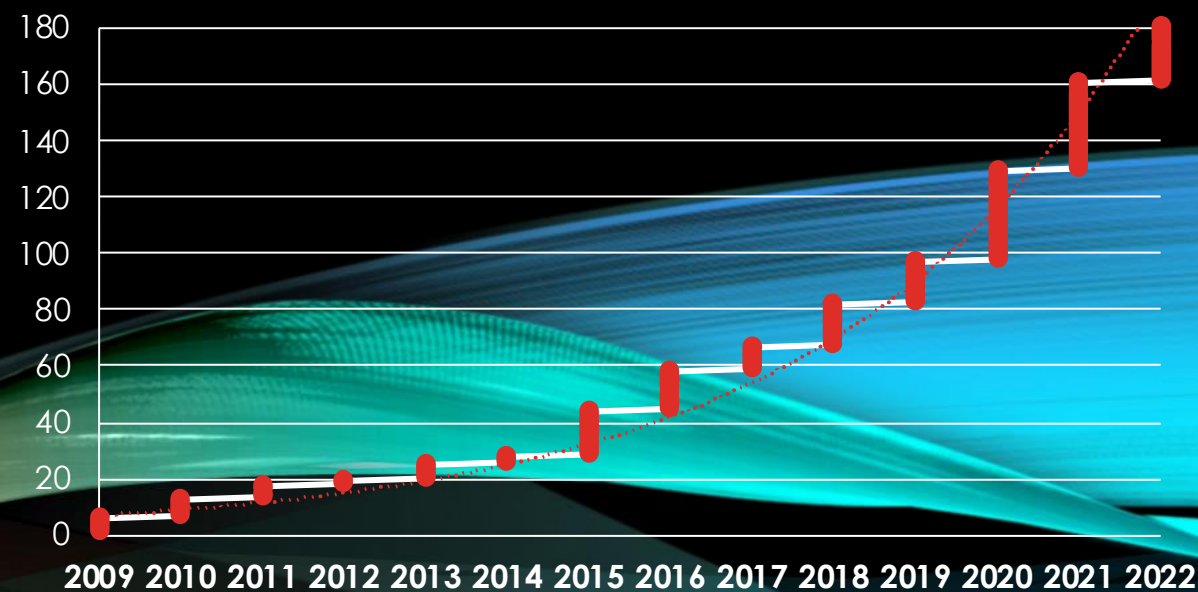


Susanna Steiner
 Administrative
 Support &
 Accounting

4 New/Updated Working Groups:

- Helicopters & VTOL (2020)
- Drones & UAS (2020)
- Space Technologies (2021)
- R&D and processes (2024)

SAC Members [2009 - 2022]



SUPPLIERS

OEM



TIER 1

Systems & Modules



TIER 2

Components



TIER 3

Parts



INDUSTRIAL PROCESSING & MACHINERY



UAS & OPERATIONS



LOGISTICS & INFRASTRUCTURE



ENGINEERING, CONSULTING & SERVICES



INSURANCE & LEGAL



FINANCING & GOVERNMENT

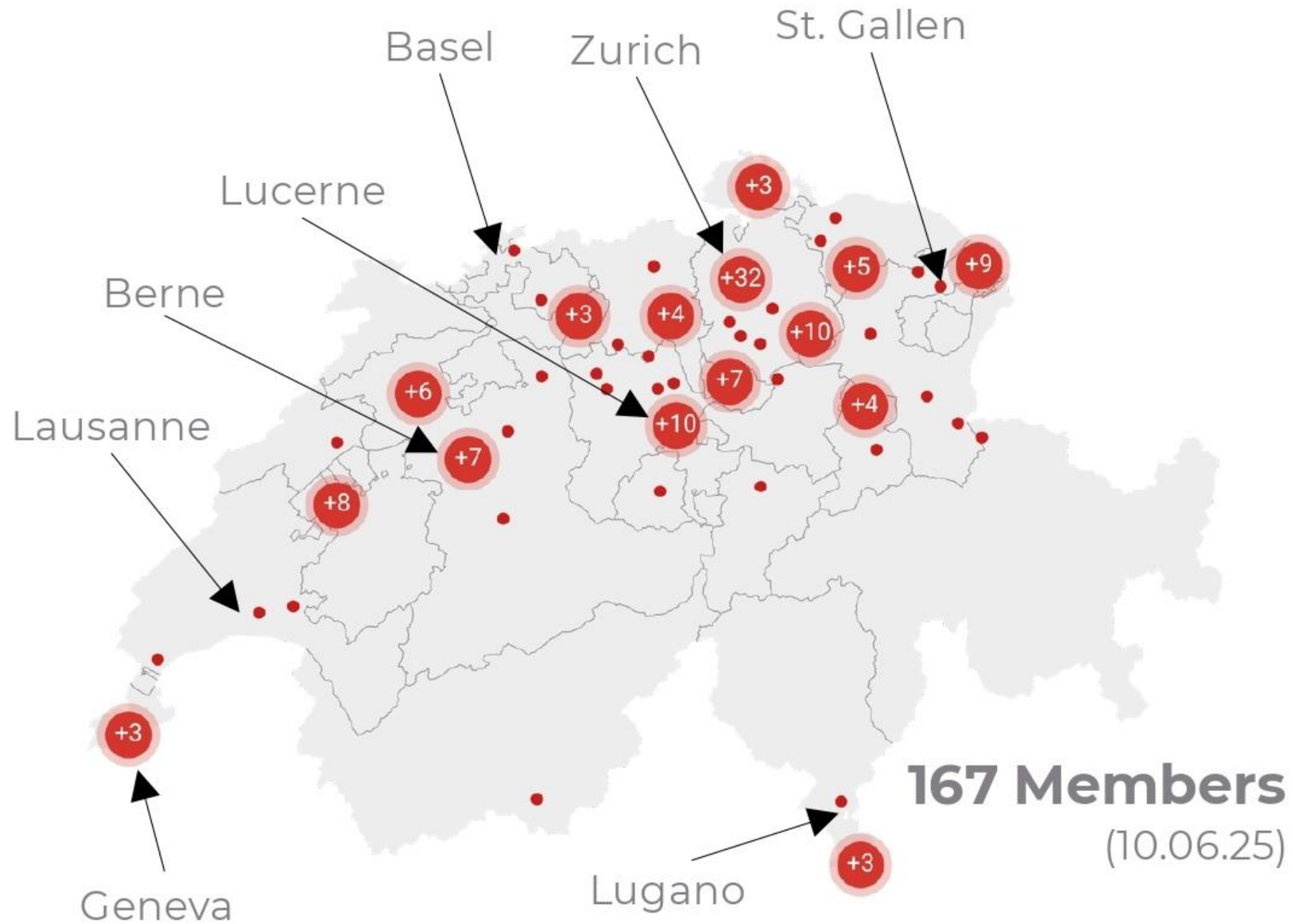


PARTNER ORGANISATIONS



RESEARCH INSTITUTIONS





SERVICES AT A GLANCE

- **Visibility**: online directory on SAC website, presenting company. Can use SAC logo
 - Revamping website, linkedin presence
 - Member news & announcements: can go via various SAC channels
- **Events**: 1 large event / year co-organized (discount attendance)
 - + New Year's reception
 - + Annual General Meeting
 - + Smaller events – e.g. networking lunches or evenings, contacts from international
- **Joint Swiss Pavilions** at international air shows (discount rate)
- **Newsletter**
- **Silver Membership Switzerland Global Enterprise (SGE)** - discount on their services - support for export (e.g. consulting, reports, on-ground expertise)
 - will be contacted directly
- **Trade missions** (ad hoc, costs extra)
- **Access to R&D projects** – exclusive calls for participation, get Innosuisse etc.
- **Working Groups**: the heart of the association
 - allows more intimate and relevant networking, company visits, joint projects
 - meet 3-4x / year

 Do you want SAC to continue organizing events? If so, big or small?

Multiple Choice Poll  35 votes  35 participants

No - 1 vote



Yes - large events (>100 attendees) - 21 votes




Yes - small events - 13 votes



Don't know / need more info - 0 votes

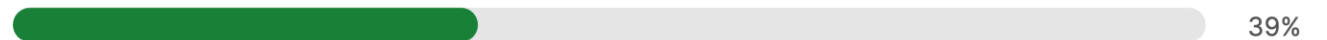


FUTURE SERVICES

 Should SAC boost its presence at international events? E.g. attend more of them, or do more than a booth?

Multiple Choice Poll  36 votes  36 participants

No - 14 votes



Yes - 15 votes



Don't know - 7 votes





Which new SAC services would you value most? (pick 2):

Multiple Choice Poll 32 votes 32 participants

inter-member communication - 24 votes



R&D / research / tech transfer - 14 votes



curated info hub / industry news - 3 votes



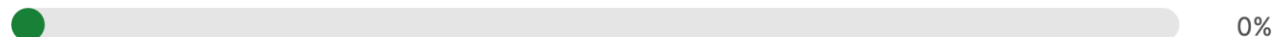
towards a marketplace - 12 votes



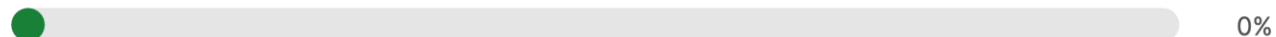
YES (to all) - 1 vote



NO (wrong track) - 0 votes



Don't know / need more info - 0 votes



FUTURE SERVICES

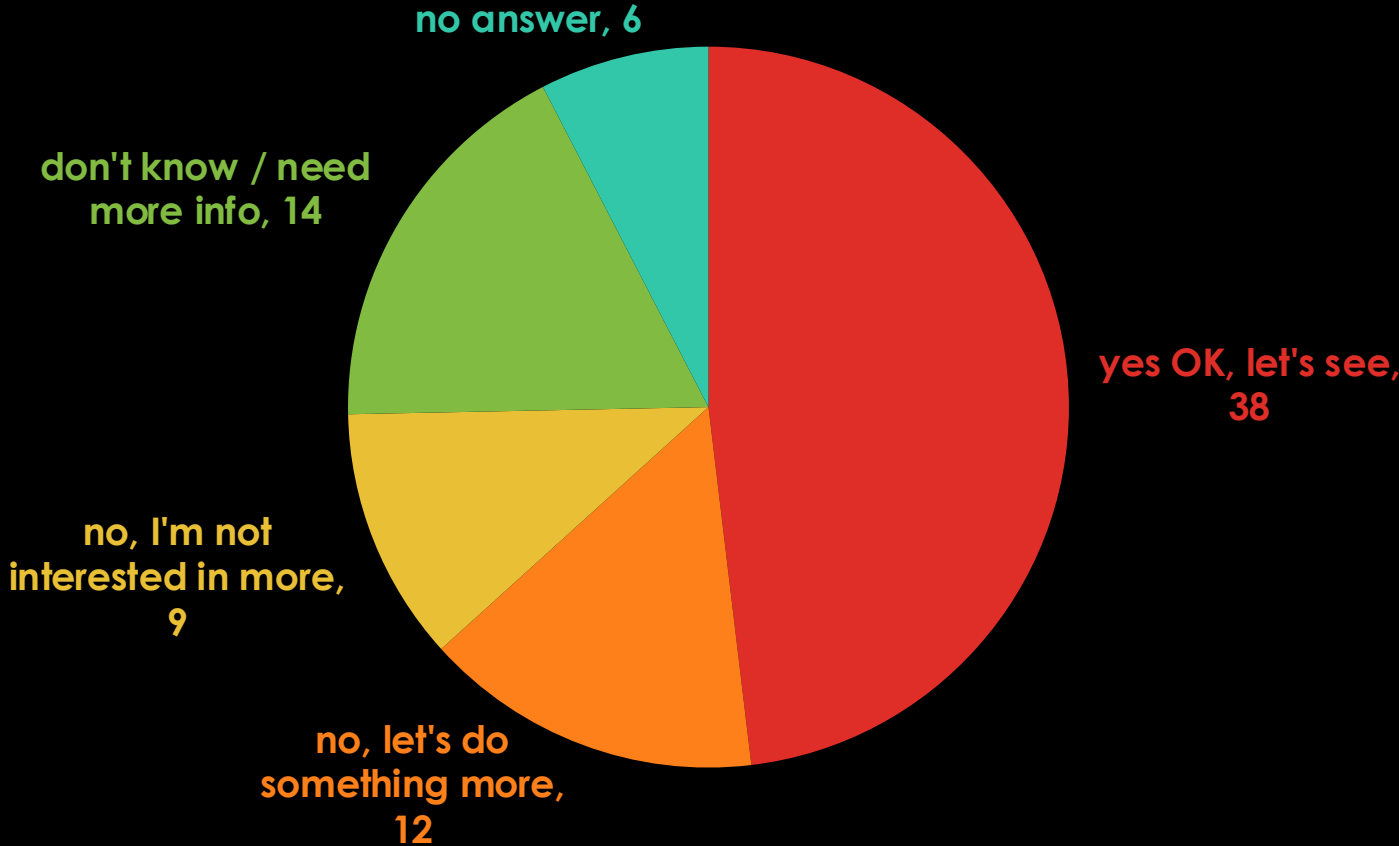
inter-member communication	e.g. platform for communication & matchmaking (B2match-like); networking evenings
R&D / research / tech transfer	e.g. matchmaking for joint research / R&D, Calls for Ideas, joint proposals / infrastructure, talks to transfer results
curated info hub / industry news	e.g. curated industry news, member/local news, job posts...
towards a marketplace	e.g. map SAC capabilities/offerings; towards joint catalogue; joint CRM tools/lists; buying/selling groups (GPO)



FUTURE SERVICES

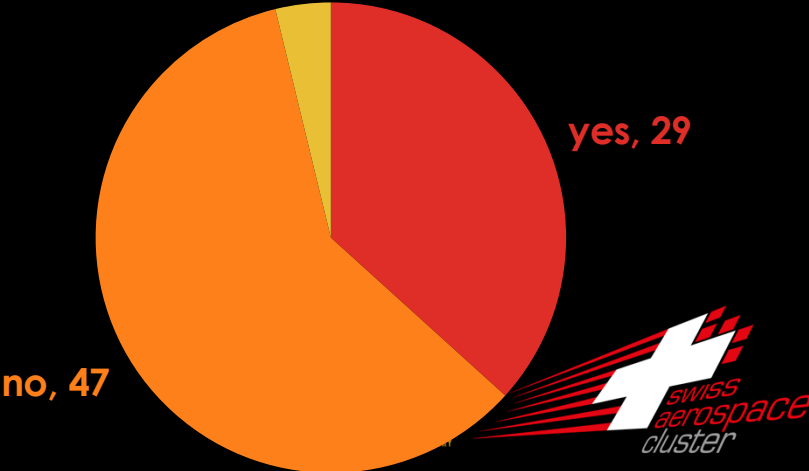
RESULTS FROM
A&S SYMPOSIUM 2024
Q1 OF 4

THERE ARE CALLS FOR MORE NETWORKING & MATCHMAKING.
IS NETWORKING EVENINGS/LUNCHS, AND LINKEDIN GROUP OK TO
START?



79 respondents

ARE YOU A MEMBER OF THE SAC?
no answer, 3

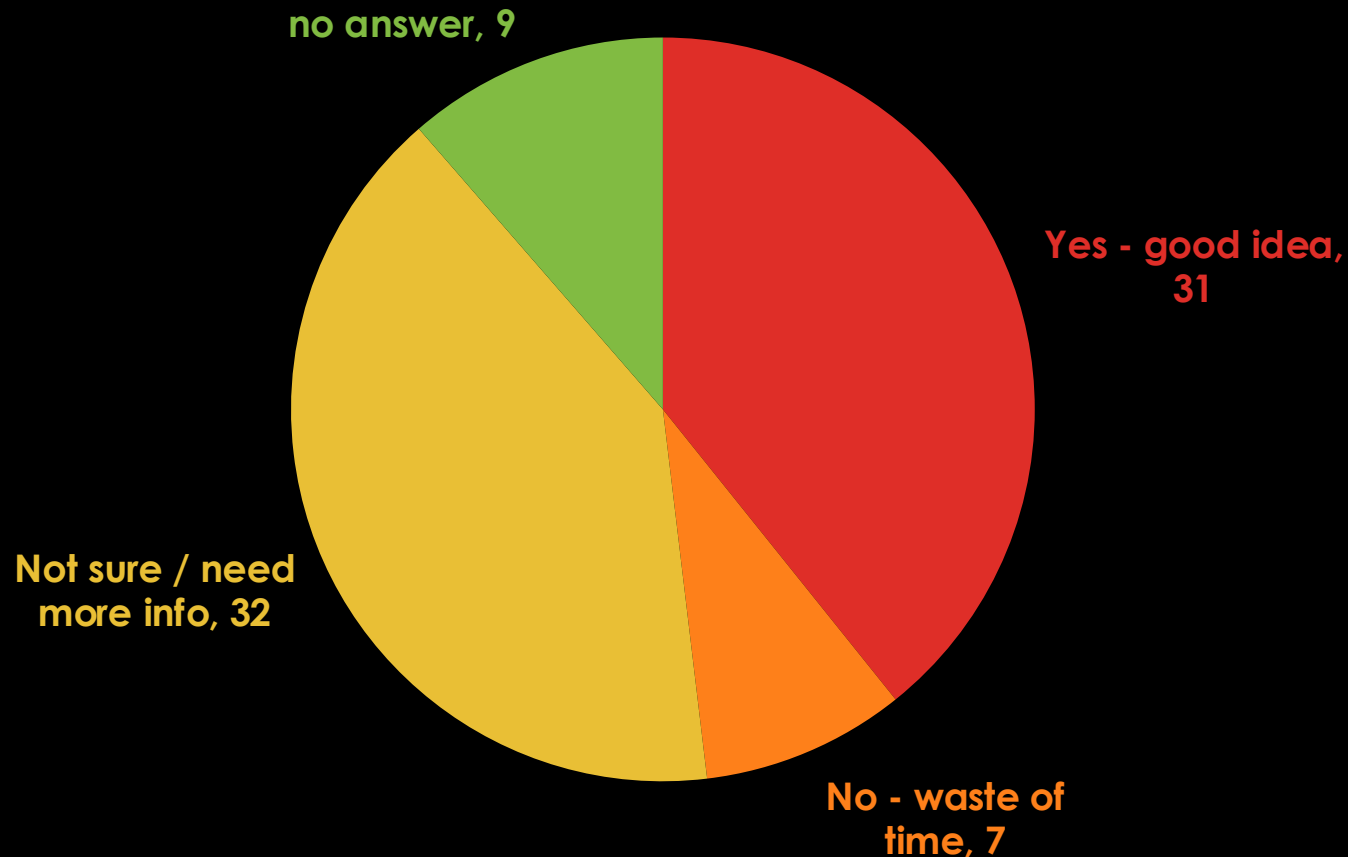


FUTURE SERVICES

THERE ARE CALLS FOR A COMPETENCE MATRIX, AND JOINT PROJECTS.

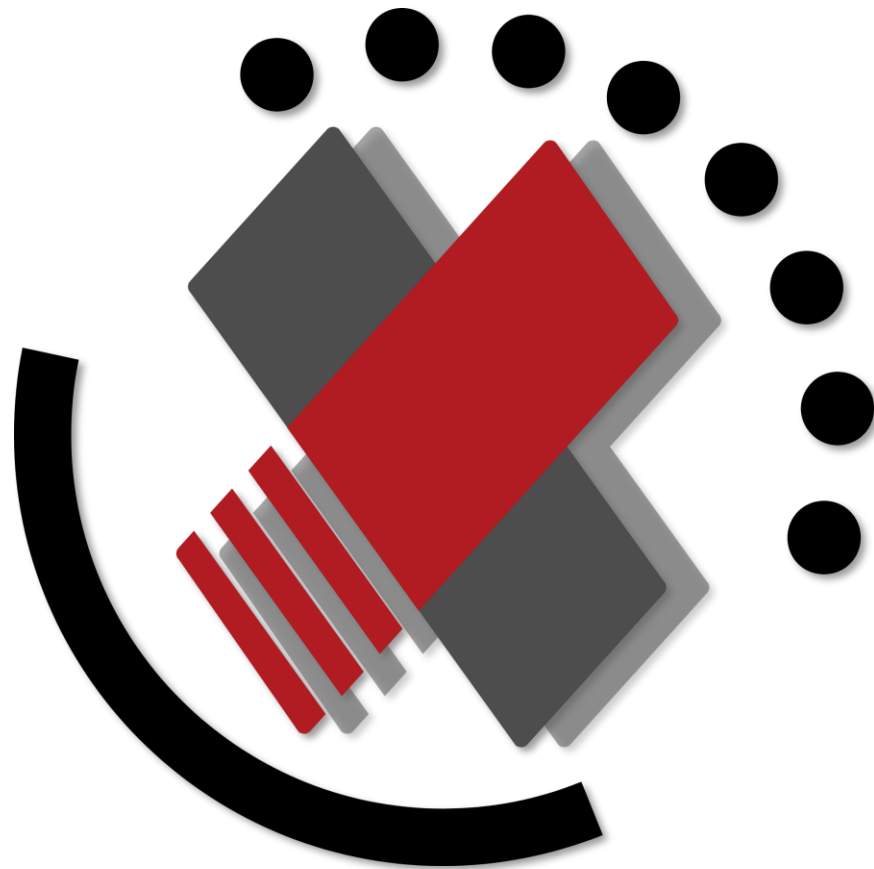
DO YOU SUPPORT AN EFFORT ON COMPETENCE MAPPING, WITH THE GOAL OF FACILITATING JOINT PROJECTS, COLLABORATIONS ETC., AND MAYBE A MARKETPLACE?

RESULTS FROM
A&S SYMPOSIUM 2024
Q3 OF 4



Networking
Event Series

powered by
Innosuisse



Aerospace Innovation Days



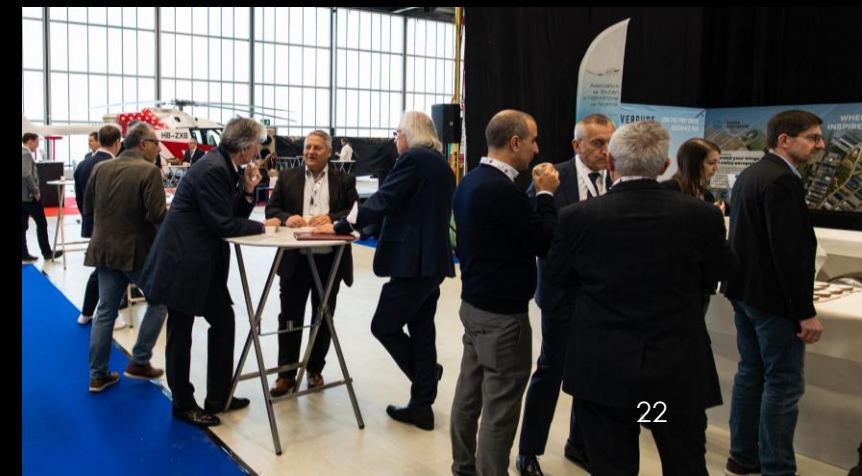
ROTORS SWITZERLAND

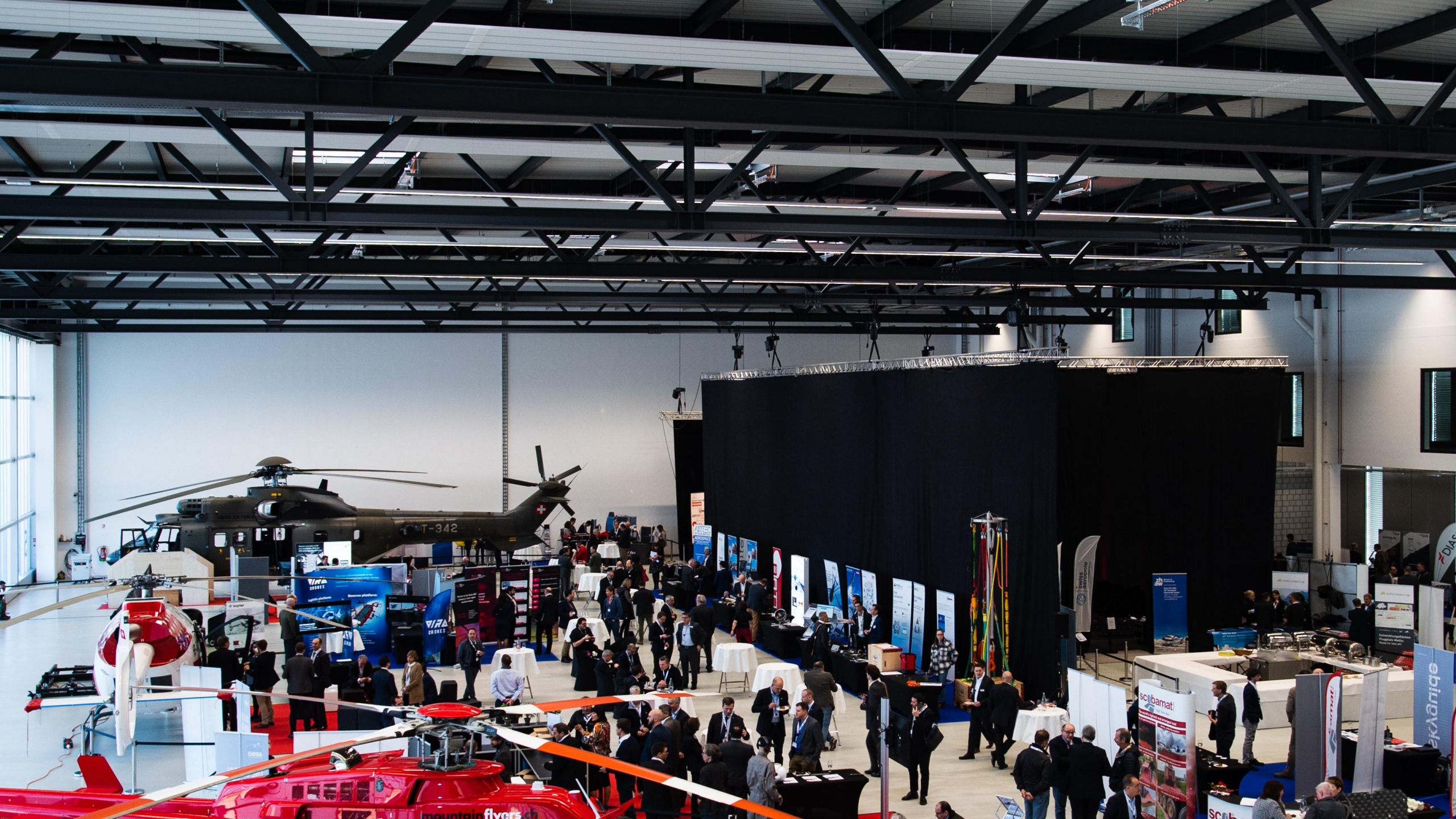
Helicopters | Drones | VTOL



ROTORS SWITZERLAND
Helicopters | Drones | VTOL

280 Attendees
55 Exhibitors
#ROTORS22
Payerne Airport







320 Attendees
84 Exhibitors
#AS22
#BAM22
OLMA St. Gallen

250 Attendees
50 Exhibitors
#SAM21
KKL Luzern



SAM

COMMERCIAL SPACE DAYS

Symposium Air Mobility
Urban | Air | Space Technologies

The central graphic features the SAM logo, which consists of a stylized cross shape with red and grey segments. To its right is the "COMMERCIAL SPACE DAYS" logo in a vertical, blue, sans-serif font. Below these logos, the text "Symposium Air Mobility" and "Urban | Air | Space Technologies" is displayed in a clean, black font.



COMMERCIAL
SPACE DAYS

11-12 SEPTEMBER 2023 | LUZERN

COMMERCIAL SPACE DAYS

11-12 SEPTEMBER 2023 | LUZERN

- Two-Day Space Congress at KKL Conference Center (Luzern) with focus on New Space Economy and Commercialization, supported by:
 - European Space Agency (ESA)
 - European Center for Space Economy and Commerce (ECSECO)
 - Swiss Space Office (SSO)
- Complete Overview of Commercial Projects Landscape
- Collaboration Workshops
- Networking & Matchmaking
- Projection & Multimedia Show Planetarium
- Gala Dinner in Aviation & Space Exhibition
- ECSECO Awards



400 Participants!

COMMERCIAL SPACE DAYS

2 DAYS
5 FLOORS
30 SPEAKERS
400 B2B PARTICIPANTS ONSITE
ESA | ECSECO | OECD | WEF | NASA | SERI

*CONSIDERING WHAT REALLY MATTERS
IN NEWSPACE ECONOMY AND COMMERCE!*



DAY 1 AUDITORIUM + LIVE STREAM

13:30 - 17:00 CET

INNOVATION ECONOMY IN SPACE | THE GREAT DEBATE

**A MUST SEE
PANEL!**



Mariana Mazzucato
Professor | Economics & Innovation
University College London



Dominique Foray
Professor em. | Economics & Innovation
Ecole Polytechnique Federale de Lausanne



Vivianna Fang He
Professor | Entrepreneurship & Innovation
University of St. Gallen



Matthew Weinzierl
Professor | Space Economics
Harvard Business School



Alexander MacDonald
Chief Economist
National Aeronautics and Space Administration

SPACE

MISSION.CH

by swiss aerospace cluster

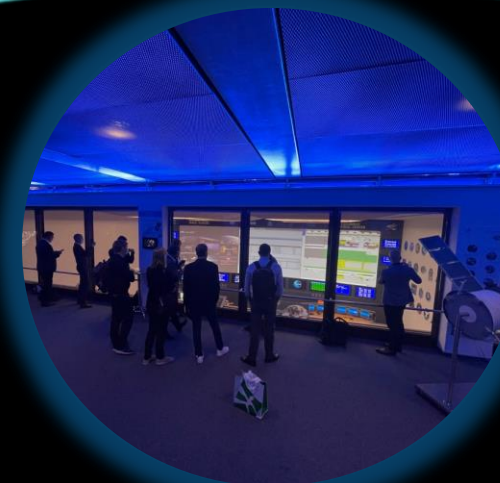
“NEW MARKETS” INITIATIVE

• Annual Trade Missions

- SPACE MISSION **GERMANY 2022** (DLR, AIRBUS, THALES ALENIA SPACE, ISAR AEROSPACE)
- DISCOVERY MISSION **OKLAHOMA 2022**
- SPACE MISSION **USA 2023** (ALABAMA & FLORIDA)

• Joint Activities (inhouse, domestic & abroad)

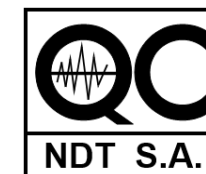
- Info Webinars & Hybrid Events
- Company Visits & Networking
- Trade Show Delegations
- Co-Exhibitor Concepts
- Swiss Pavilions (T-LINK)
- Partnerships: SWISSMEM, DIAS, AEROSUISSE, S-GE, ESA-BIC, EACP



Space Mission Germany Edition 2022



SPACE MISSION 2022 (GERMANY)



NEW INITIATIVE: R&D PROJECTS

- New R&D WG – plan to do White Papers, joint projects (e.g. Innosuisse)
- New R&D-focused Cluster Officers
- Interest expressed by member survey, Board, and in SAC Statutes
- Ideas already in proposal form (with traction!)
 - Next-gen offerings explorer & competence matrix: *Supplier Ecosystem Explorer*
 - Linked to ESA's new Strategic Tech Planning System
 - Concurrent Engineering Facility 2.0
 - Modeling industry dynamics: *Understanding NewSpace: A Systems Model*
 - Modularity design for (aero)space
 - Etc.
- Got 1st Innosuisse support for SAC project ("next-gen" capability map/catalogue)
- Vision: SAC as vehicle for industry shaping of proposals, R&D...

SAC BOARD



**Ronny
Schreiter**
President

Bossard Aerospace



**Massimo
Fiorin**

Swiss Aeropole



**Alexandra
Isele**

Beyond Gravity



**Dr. Maurizio
Scaramuzza**

Skyguide



**Stephan
Kocher**

BridgeKo



**Angelo
Esposito**

Aurora Swiss Aerospace

#bettertogether

THANK YOU!



SCAN ME

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office@swiss-aerospace-cluster.ch



University of St.Gallen

Center for Aviation and Space Competence





APPENDIX

SAC BOARD



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Schreiter**
President

Bossard Aerospace



**Massimo
Fiorin**

Swiss Aeropole



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Beyond Gravity



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Scaramuzza**

Skyguide



**Stephan
Kocher**

BridgeKo



**Angelo
Esposito**

Aurora Swiss Aerospace



Membership Fees 2024 (UNCHANGED)



RESULT:

Yes (Approved):

No (Rejected):

Abstention:

Category	Current Fee
Start-ups (founded max. 3 years ago)	CHF 300
Industrial Partners, Federal Government & Cantons with 1 to 20 employees	CHF 500
Industrial Partners, Federal Government & Cantons with up to 150 employees	CHF 850
Industrial Partners, Federal Government & Cantons with more than 150 employees	CHF 1'500
Colleges, Universities & Individual Research Institutes	CHF 500
Associations & Committees	CHF 500



**COMMERCIAL
SPACE DAYS**

11-12 SEPTEMBER 2023 | LUZERN

EXTENDED TEAM



New Members

2020 - 2022

8tree GmbH

AVIOTRACE SWISS SA

Cucuyo AG

ABS Broker Service AG

Axalp Technologies AG

Daedalean AG

ADVENTURE SAS

AXIS Flight Training Systems GmbH

DESAPRO AG

aero+ (Sparte der Jörimann Stahl AG) Berns Engineering Consulting GmbH Destinus

Aersolution Interior AG

BIBUS METALS AG

Dpendent

AFM Airport Services SA

BINC Industries SA

Dreyfus Aviatik GmbH

Aircraft Solutions

Centaurium Aviation Ltd.

Drone Harmony AG

Airial Robotics GmbH

CH Aerospace

ECOPARTS AG

AMROS Group

Cicor Group

Electra.Aero Schweiz GmbH

ANAVIA (A CONNOVA Company)

CRAB Analytics GmbH

ETH Zürich - Autonomous Systems

New Members

2020 - 2022

FIMUTENS Suisse SA

Fixposition AG

FLARM

Galvano Helbling AG

generativ GmbH

GRITEC AG

HAYWARD AND GREEN AVIATION

Heli and Co

Hensoldt Sensors GmbH

Honeywell

Iscar Hartmetall AG

KEEPEARS GmbH

Klepsydra Technologies AG

Kuehne + Nagel AG

Manta Aircraft SA

Mecaplex AG

Mercury Mission Systems Intl S.A.

MME Legal Ltd

Mobilitätsakademie AG

MobLab

Mollis Airport AG

Murzilli Consulting

NEXT SA

Orbit Management Services

QBT SAGL

Qualitech AG

Quality Control NDT S.A.

Radiate Engineering & Design AG

Rapid Manufacturing AG

ROSAS/HEIA-FR

New Members

2020 - 2022

RUAG AG

Swiss Quality Broker Partner AG

v2sky GmbH

Schweizerische Mobiliar

Switzerland Innovation Park Biel

Verein Electrify-In Switzerland

Sky Hunters, Kilpatrick Group

Tata Consultancy Services CH

VIRA DRONES SA

Smartflyer Ltd.

The PlatForm SA

Voliro AG

Start-up Project inclusas

Toray Advanced Composites

Suisse Technology Partners Ltd.

TXT e-Solutions Sagl

Swiss Aviation Group AG

UASystems SA

Swiss Drones Operating AG

UMS Skeldar AG

Swiss Fibertec AG

Universität Zürich - UZH Space Hub

Swiss Hydraulic and Pneumatic

Urartu Systems SA

