



**FINMECCANICA**

**Finmeccanica: The Next Frontier**

**Pier Francesco Guarguaglini**  
Chairman and CEO

- The on going evolution of the Finmeccanica's traditional reference market is driving the progress of the Group offer also towards adjacent market sectors that until now have not been fully explored, leveraging on technologies and competencies available today inside several companies.
- Therefore the anticipation of the market's needs becomes highly strategic, focusing on new and emerging sectors, through a policy of selected investments in R&D and the definition of strategic alliances with selected partners.

***Finmeccanica is ready to address the future challenges imposed by today's changes in the world scenario***

*Homeland Security*



**Focus on systems**

Complete offering able to meet customer needs

*Transport*



**Focus on product**

High Speed Trains ,Signalling and Driverless metro

*Energy*



**Focus on services**

Localisation of service centers and Turbines manufacturing in key markets is essential to fulfill clients' expectations and meet their demand

*Military Aeronautics*



**Focus on Trainers**

From MB339, SF260 to the new new generation advanced/lead-in fighter trainer M346

*Helicopters*



**Focus on breakthrough**

BA609 tiltrotor represents a “game changer” for AgustaWestland , resulting in a tool for penetration in otherwise non accessible market



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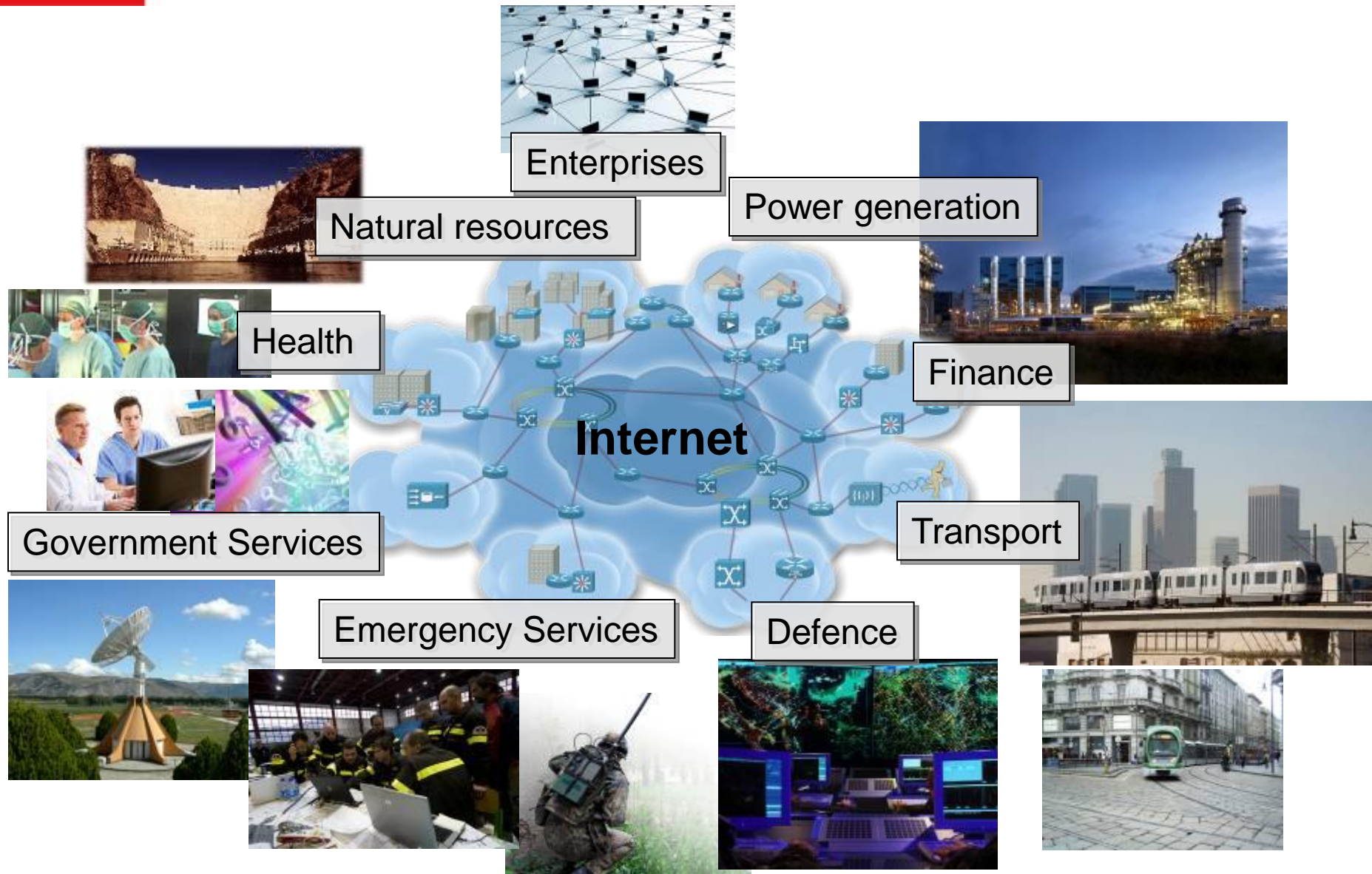
**Finmeccanica: The Next Frontier**

**Cyber Security**

**Paolo Aielli**

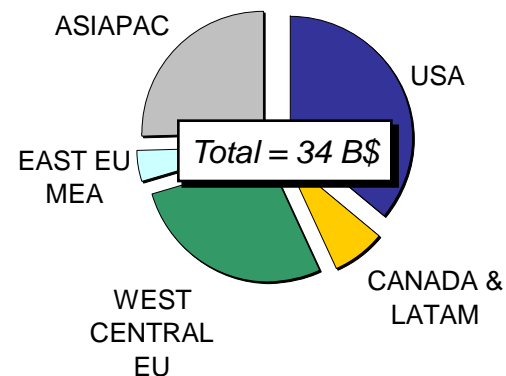
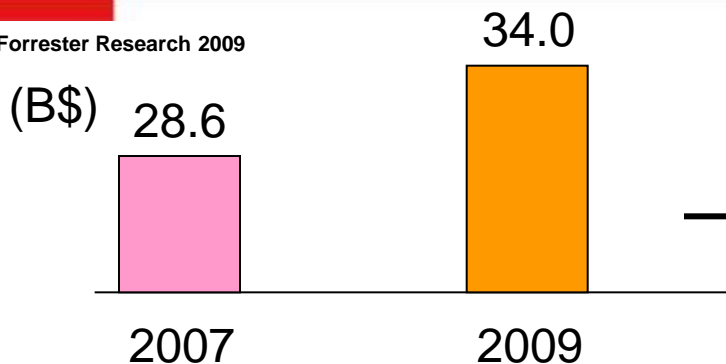
**CEO Elsag Datamat**

# The Cyber Multi-Dimensional Threats: A Global Security Challenge

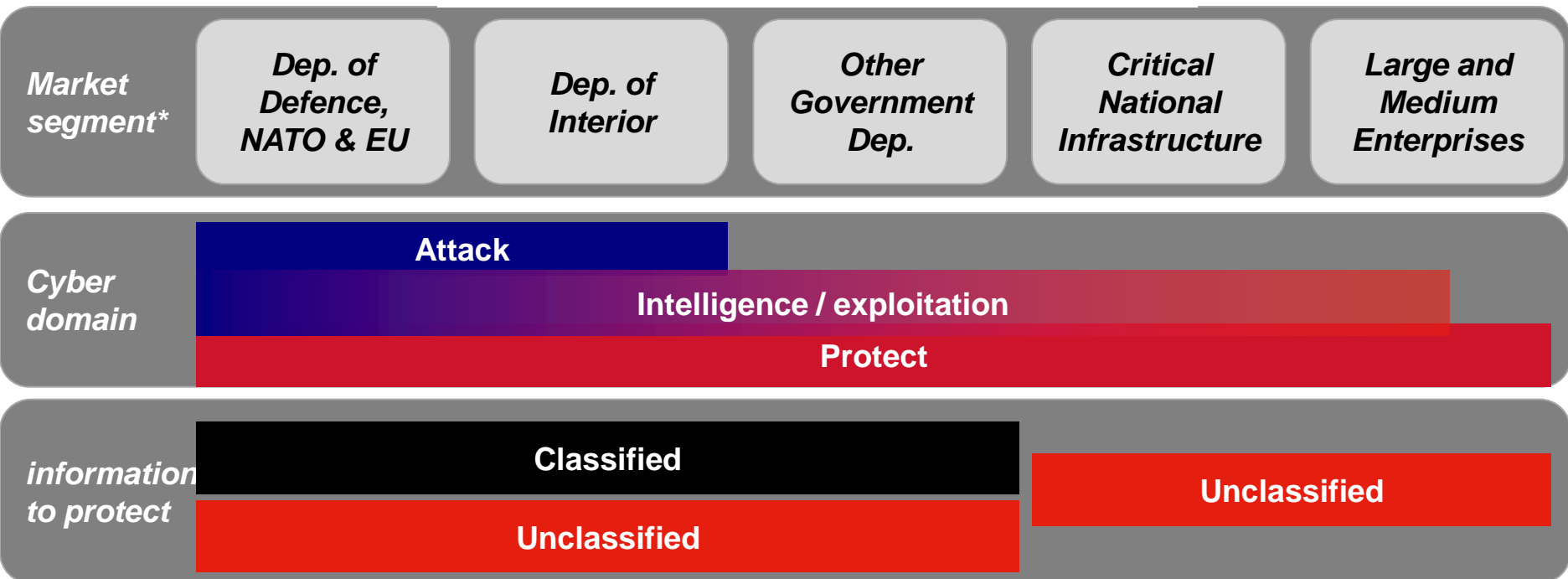


# Cyber Security Market and Segmentation

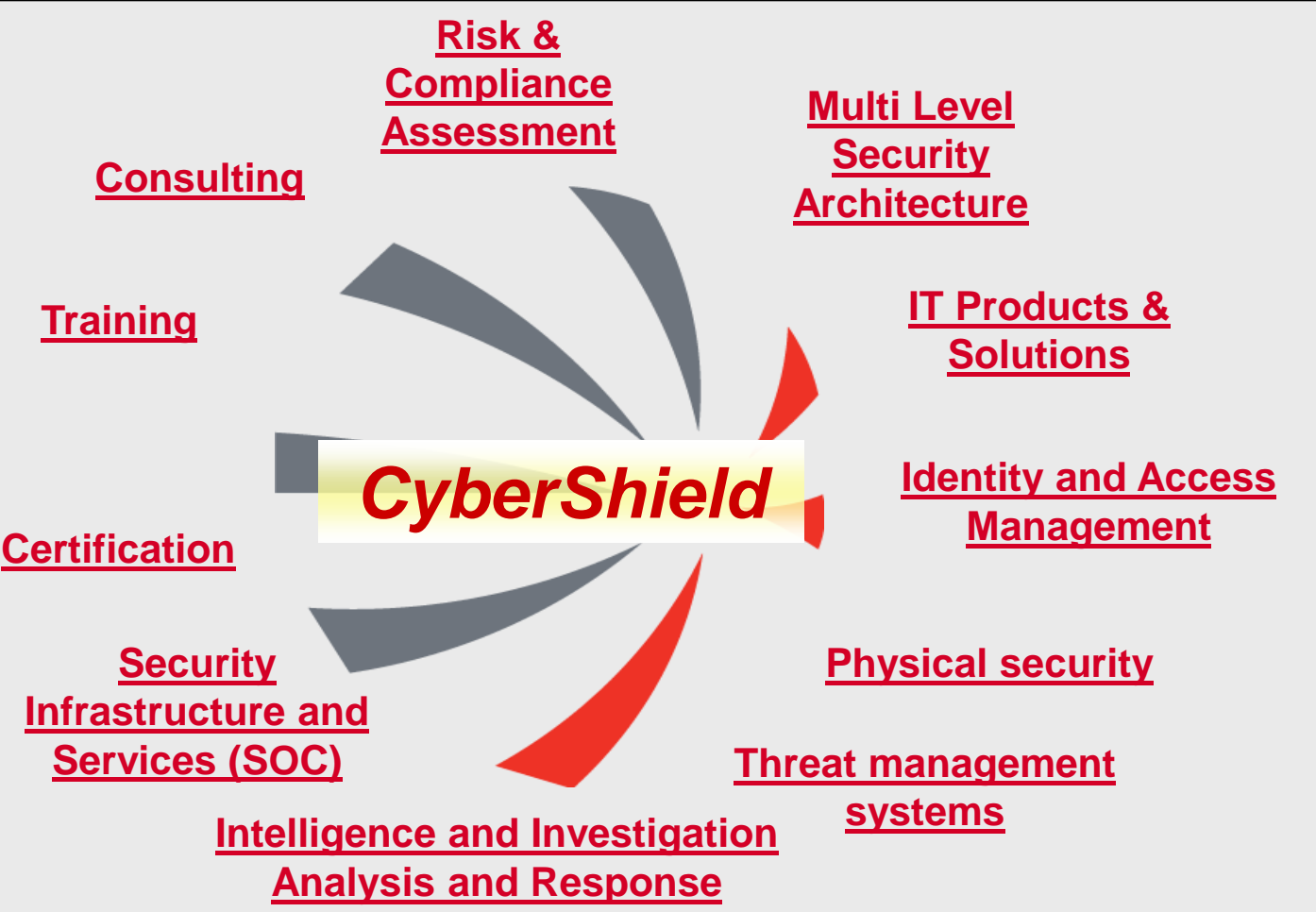
Source: Forrester Research 2009



+ **Complexity of cyber security issue** -



# Finmeccanica Cyber Security Capabilities



- **Military**
- **Critical Infrastructures**
- **Institutions**
- **Public Administration**
- **Finance sector**
- **Large enterprises**
- **Investigation**



# Finmeccanica Strengths in Cyber

## Portfolio Offer and Capabilities

- Comprehensive portfolio of cyber solutions and services
- Data and networking security embedded in our C4I and Homeland Protection systems solutions
- Internal technologies and products for both physical and logic security needs
- Ad-hoc solutions for interoperability with legacy systems and/or info-structures

## SOC

- Own SOC facilities with service delivery 24/7

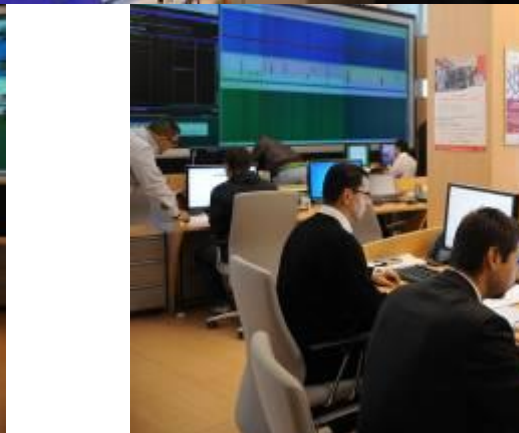
## References and know - how

- Strong track record on large clients within different industries
- Strong experience and know-how in the development and management of complex integrated solutions for large clients

**Proven and long-standing experience  
from deployed solutions and delivered services**



# Finmeccanica SOC 24/7 for Cyber Security



Modular, advanced and integrated solution based on three pillars

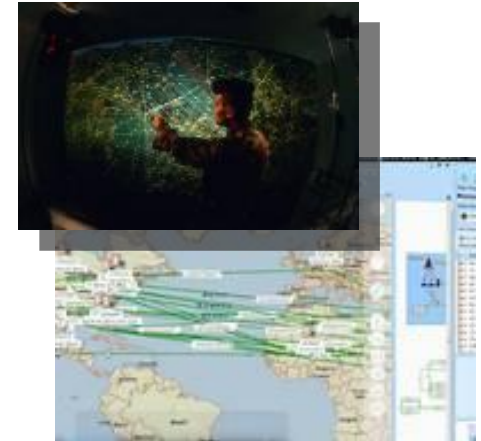
## Cyber Sensors

Info-gathering, data collection and intelligence from the network



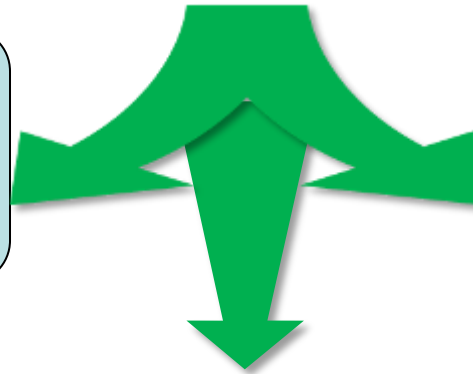
## Cyber C2

Cyber Operational Picture (CYOP)

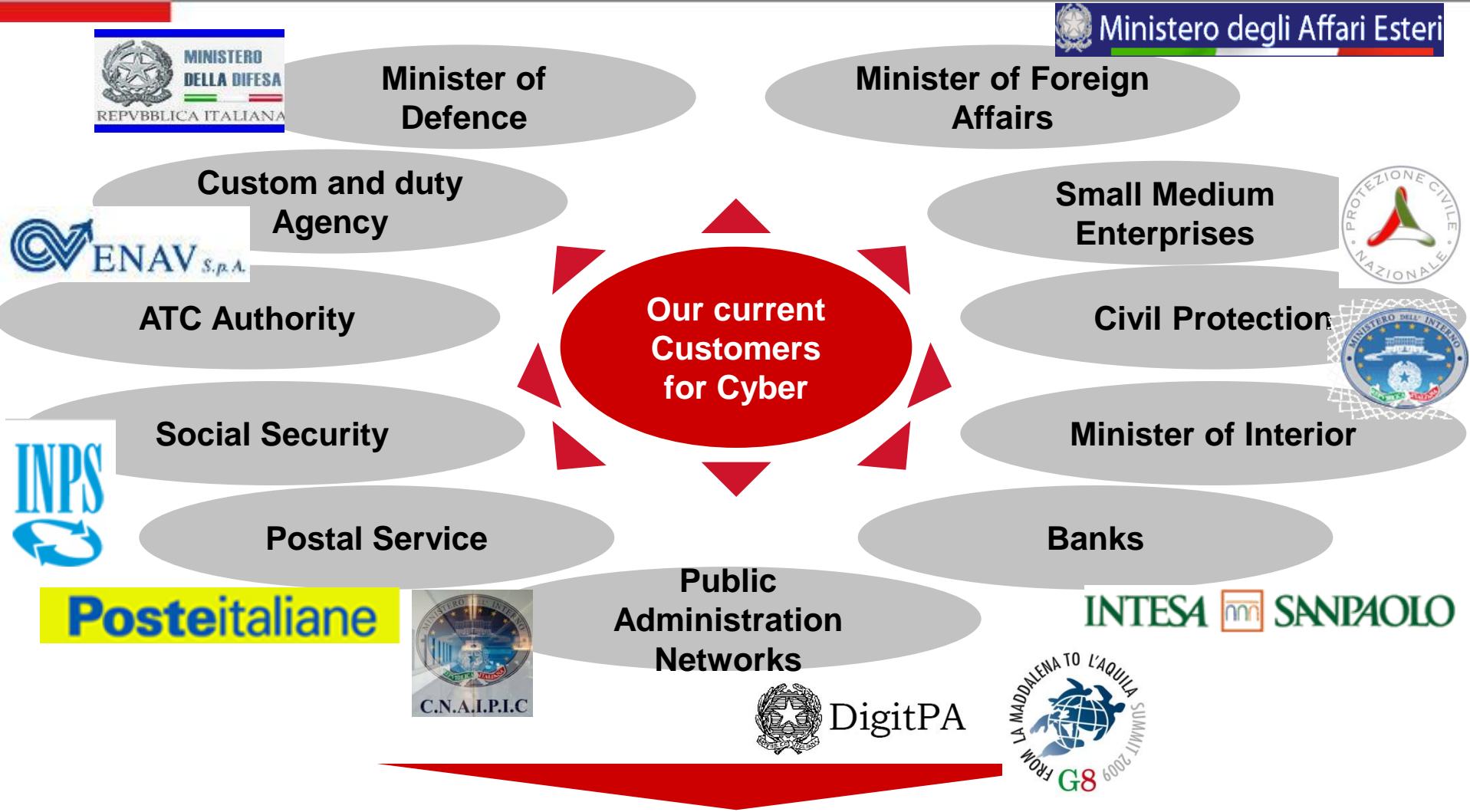


## Cyber Effectors

Prevent, Interdict and Restore



# Finmeccanica Footprint in Cyber



**Trusted provider of cyber security**

Worldwide Defence & Security Electronics  
Cyber Market 2009 – 2016

## Cyber Market

2009A  
> €25bn

**cagr 13%**



2016E  
> €60bn

- **Consolidate in Italy**
- **Position and grow in UK**
- **Provider of Choice to NATO**
- **Center of Excellence for critical infrastructure Cyber Security**
- **Expand in Transport and Energy leveraging on our related competences**
- **Leverage on CyberShield as distinctive and competitive advantage for integrated protection**
- **Global player for anti-fraud solutions**
- **Enhance competencies in intelligence and knowledge-based systems**



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**Finmeccanica: The Next Frontier**

**Focus on Nuclear & Renewables**

**Giuseppe Zampini**

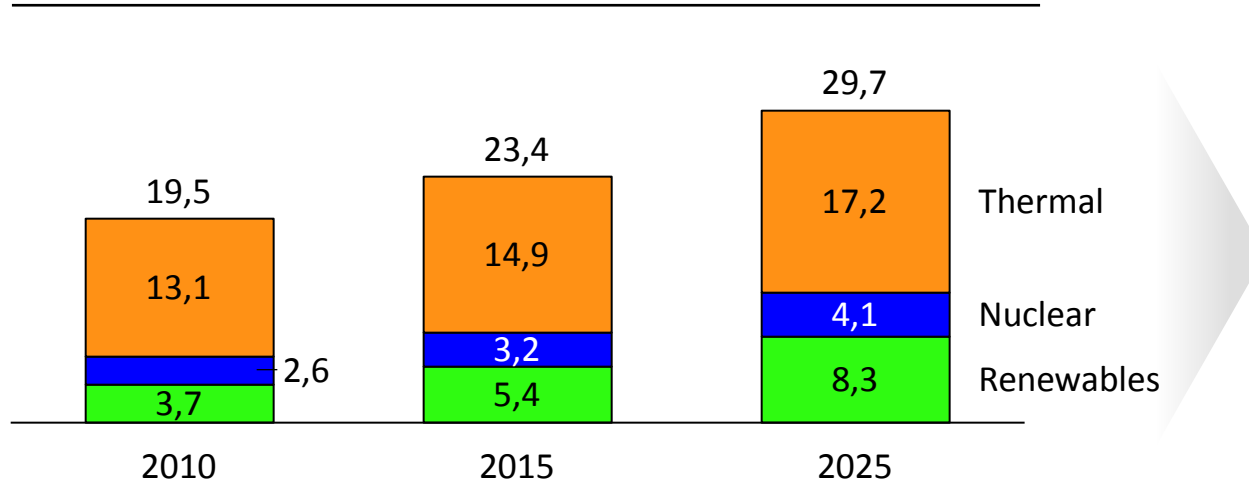
**CEO Ansaldo Energia**

## Focus on Nuclear

# Power Generation Evolution European and Italian Perspective

## Evolution of fuel mix

Global Electricity Production, '000 TWh



- **Thermal Plants are expected to keep playing a major role** in the future power generation mix, with a joint share of 55% in 2025
- **Nuclear and Renewables** will increase their contribution in the power generation

## European and Italian Sustainability Strategy

### European pillars within 2020:

- -20% emission reduction of 1990 level
- +20% of energy production from renewables
- +20% energy efficiency

### Italian pillars :

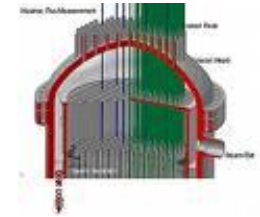
- - 14% emission reduction within 2015
- Italian power generation in 2030:  
25% Nuclear, 25% Renewables, 50% Thermal

# The Nuclear Renaissance

## The Domestic Market Opportunity

### Milestones

- **1987 Referendum** - Stop to the Italian Nuclear Program
- **2009 U- Turn Decision:** Italian Government plans the start of construction of its first New Nuclear Unit by 2013.
- **2030 Goal** : 25% base-load power generation in Italy by Nuclear Power Plants



### Actions already taken up to date

- ✓ **Law 99/2009:** Parliamentary approval of the Nuclear Development plan followed by Government Decree February 2010:  
*Principles to define sites, benefits for local communities, consultations, licensing, dismantling and deposit*
- ✓ Appointment of Nuclear Regulatory Agency – **Nov 2010**
- ✓ **Agreement ENEL/EDF** to build 4 power Plants

### Next Actions expected by 2011

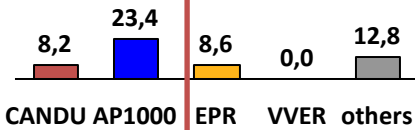
- Validation of a National nuclear strategy
- Sites Identification
- Identification of other Technologies than EPR



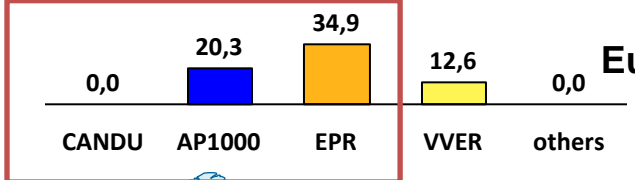
# Global Market Outlook

*GW* Almost 500 nuclear reactors planned or proposed worldwide in the next decades  
**80 planned by 2020**

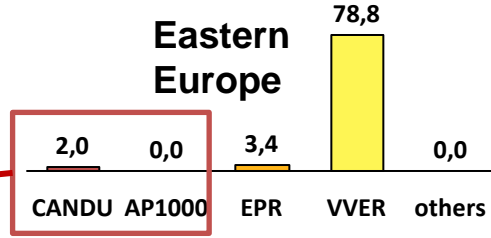
## North America



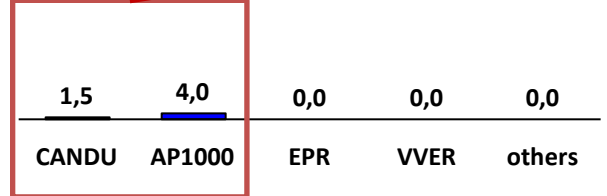
## Europe



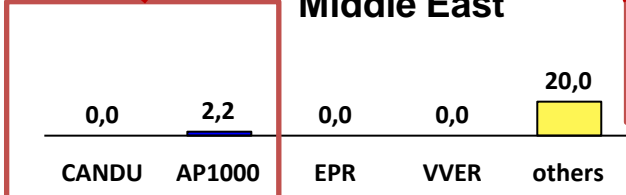
## Eastern Europe



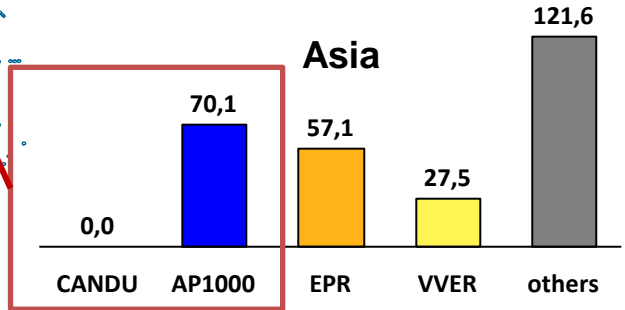
## South America



## Middle East



## Asia



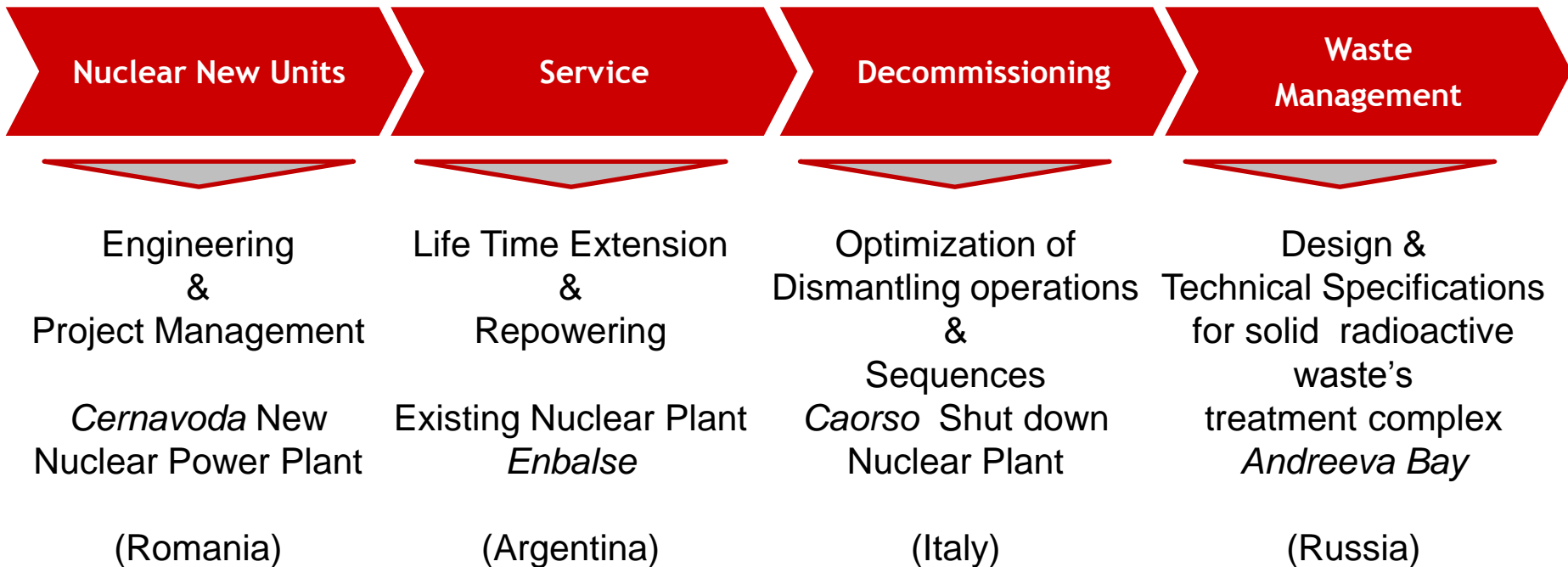
Accessible Technology

**≈1.400 B€ as cumulated market value of which 350B€ planned in Europe**

# Ansaldo Nucleare

## Key Capabilities & Positioning

More than 20 years in the International Marketplace  
Consolidating capabilities along all the Nuclear Value Chain



**Consolidated Experience on Candu and Westinghouse Generation III.  
Leading a European Consortium on Generation IV Development**

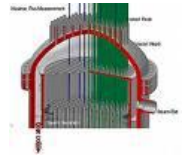
# Ansaldo Nucleare Approach

## Go To Market



- Agreement with **ENEL/EDF** and **AREVA** for 4 EPR Nuclear Plants in Italy and Europe
- **Strategic partnership** with **Westinghouse** for AP1000 in Italy and Rest of the World

## Product Development



Leveraging AEN **Manufacturing capabilities** to reposition ANN as supplier of **New Components**

### Geographical Target by Scope of Work



**ITALY:** Key Industrial Player

**EUROPE:** In partnership with Nuclear vendor

(B€)

	2011-2015	2016-2020
Worldwide Accessible Market (Candu, AP1000, EPR)	40	60
Italy Accessible Market	10-12	15
AEN/ANN Orders	1,5	2,5

## **Focus on Renewables & Distributed**

### Solar Photovoltaic & Wind



- Become the link between Banking, Financing and End Users... Focus on fast growing highly incentivized domestic market
- Leverage well proven System Integration competencies

### Connect the Business

### Biomass & Concentrated Solar Power



- Fully integrated distributed generation biomasses gasification. Integrate technologies to create solutions
- Residual oil liquid hydro carbon fuel conversion technology. Ready by 2012
- Partner to boost technology progress in solar receiver technology

### Technology Edge

(M€)

	2009	2010	2015
AEN Orders	0	>100	>250



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**Group UAV**

**Steve Mogford**  
**CEO Selex Galileo**

An Unmanned Air System (UAS) includes:-

- An Unmanned Air Vehicle (UAV): fixed or rotary wing
- The mission payload: for example radar and / or electro-optic sensors, electronic support measures, weapons (Unmanned Combat Air Systems – UCASs), etc.
- A ground control station
- Communications links, data links and relay systems
- Data exploitation and dissemination (ISTAR asset)
- Operational support infrastructure

***Finmeccanica has world-leading technology, products and capabilities in all aspects of Unmanned Air Systems***



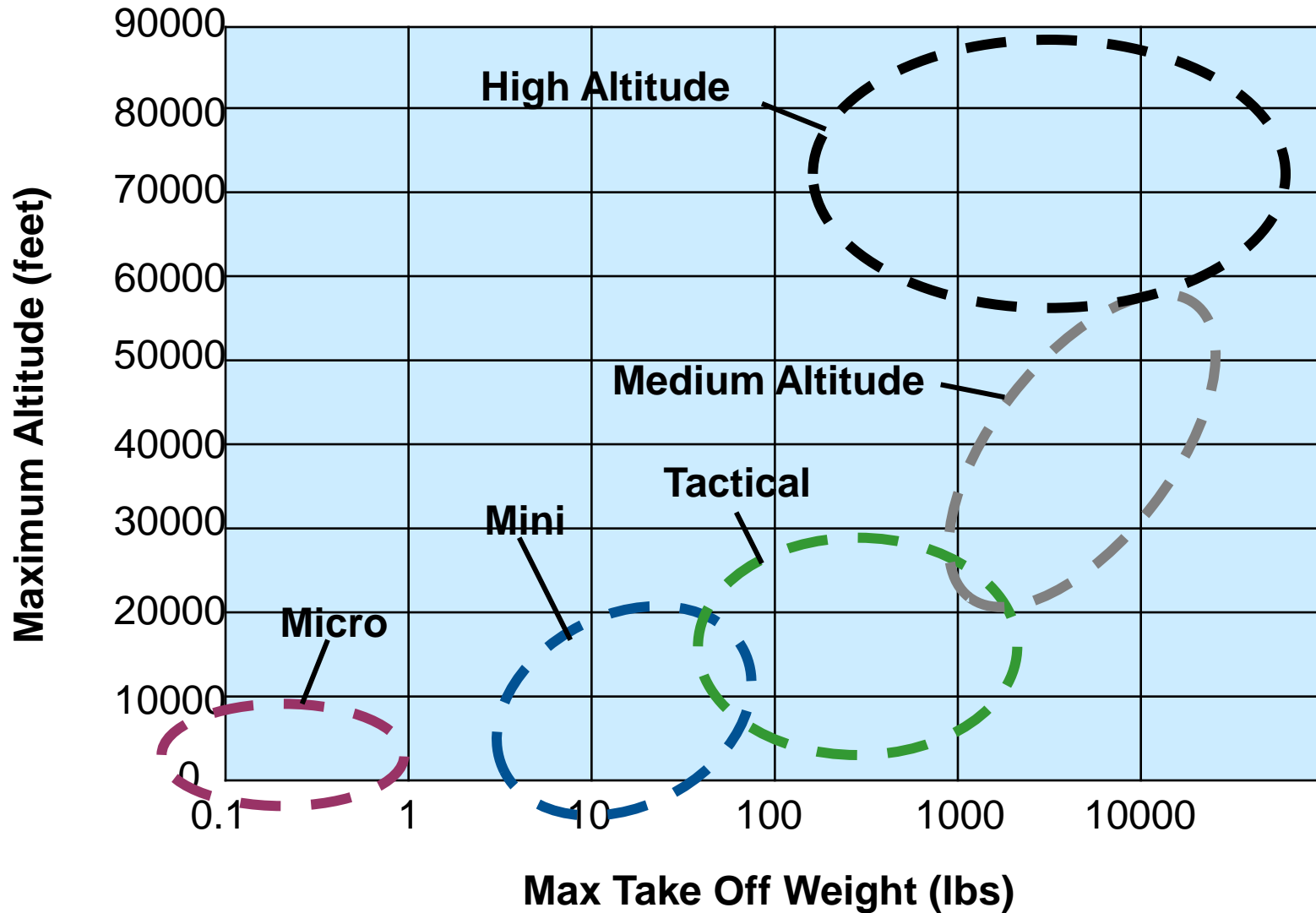
**Alenia Aeronautica SKY-X/Y OtoMelara IBIS**

**SELEX Galileo FALCO UAV and Ground Station**





# UAV Classification



# Key System Elements



## Model C1



### Mission System (Air Segment)

- Mission Management
- Data Fusion/Extraction
- Automation Control
- Sensors
- Self Protection
- Stores Management
- Communications

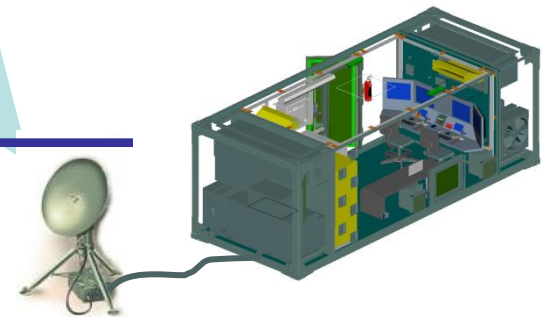
### Platform

- Airframe
- Propulsion
- Flight Controls
- Electrical Power
- Navigation

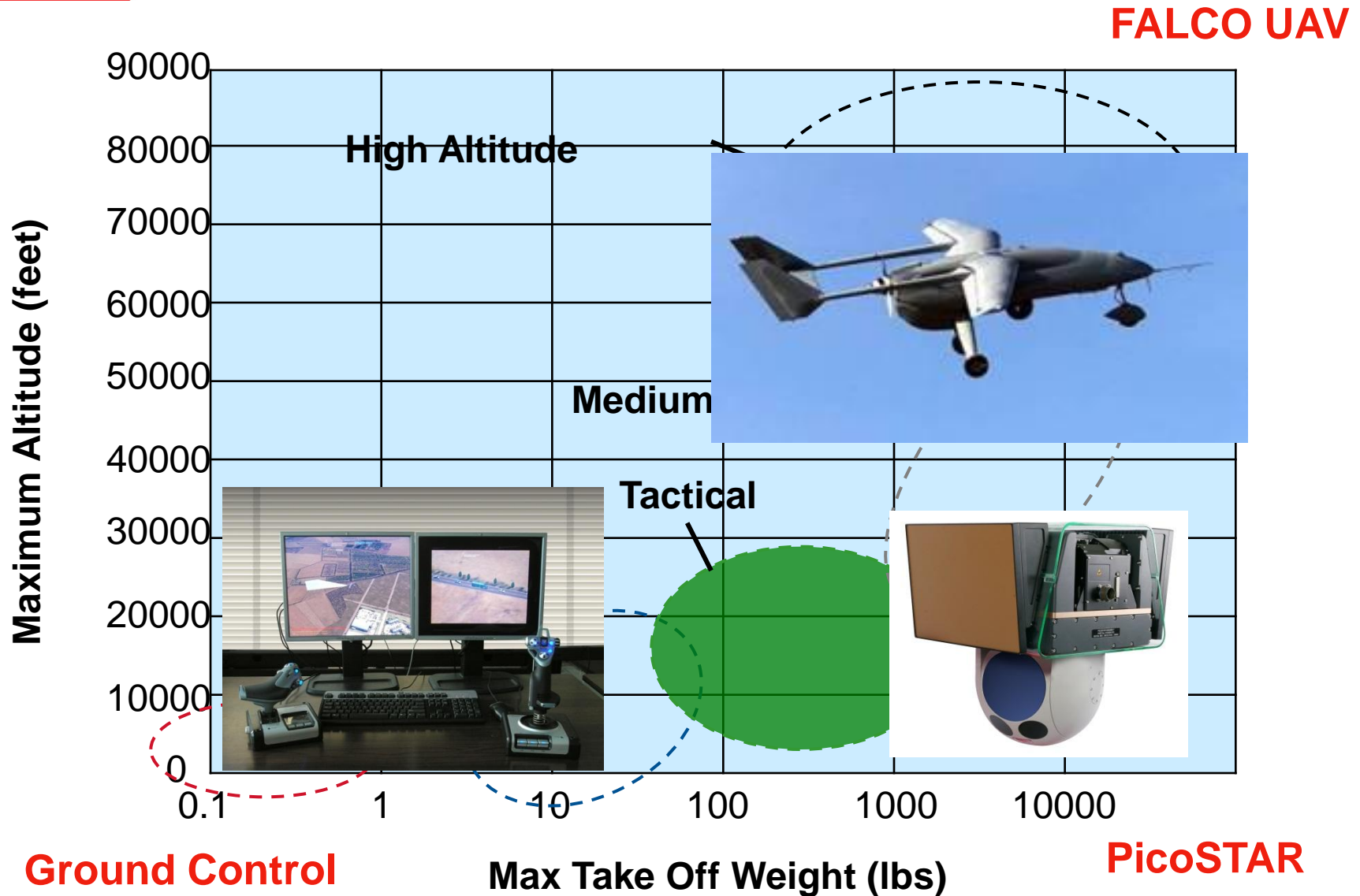


### Mission System (Ground Segment)

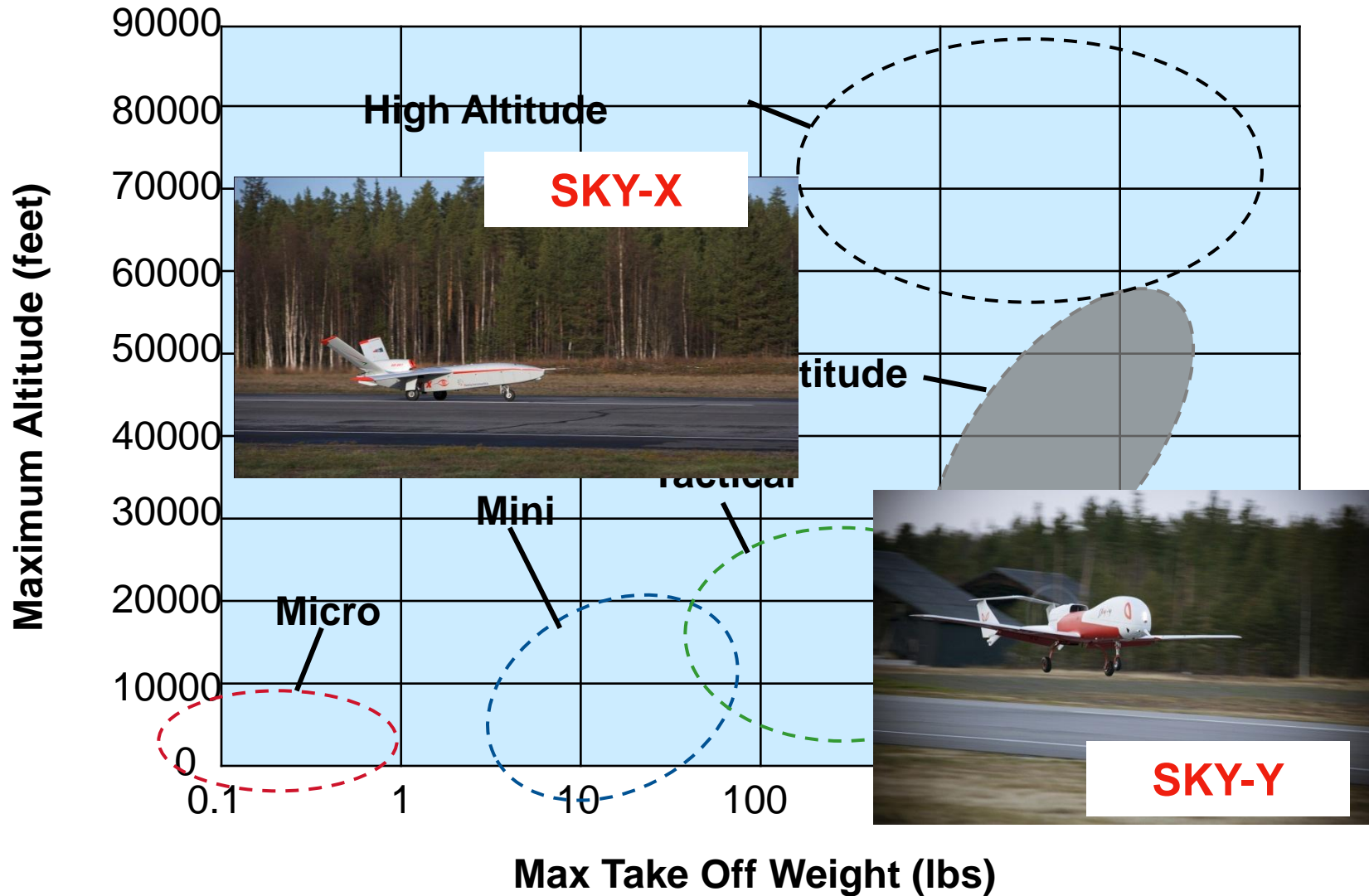
- Communications (Air Segment)
- Communications (Battlespace)
- Analysis and Exploitation
- Platform Management and Tasking
- Automation Management



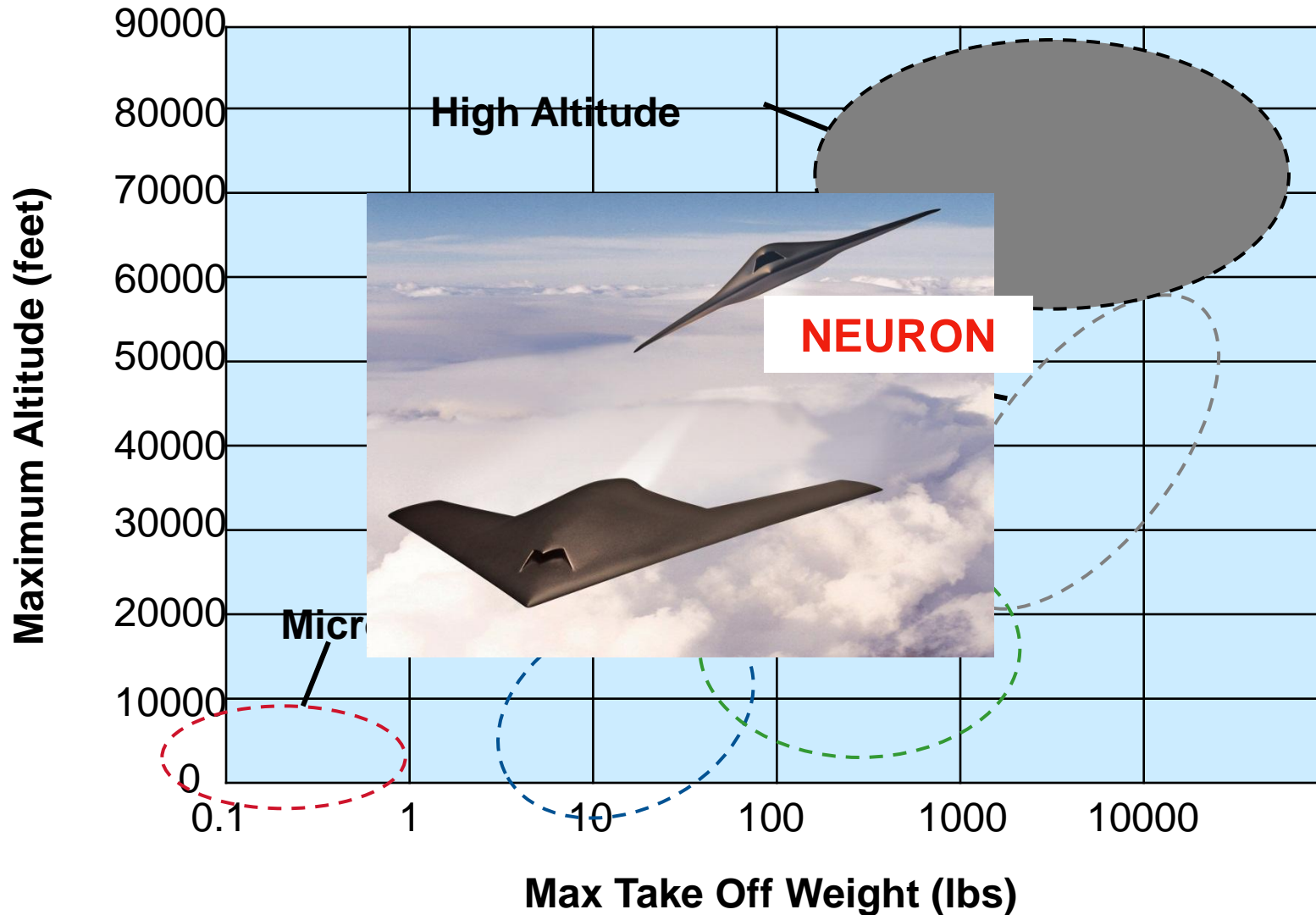
# Tactical UAS Global Market 10 Year Forecast €12.9Bn



# Medium Altitude UAS Global Market 10 Year Forecast €9.8Bn



# High Altitude/UCAS Global Market 10 Year Forecast €26.4Bn



- Finmeccanica well positioned across range of UAS classes
- Exploiting tactical UAS and payloads in export markets
- Leading European experience in MALE technology demonstration
- MALE mission system development underway – both airborne and ground elements
- Leading provider of payloads
- Major player in European UCAS demonstrator
- Positioned to exploit anticipated European collaboration in UAS