

Japan's Aircraft Industrial Policy

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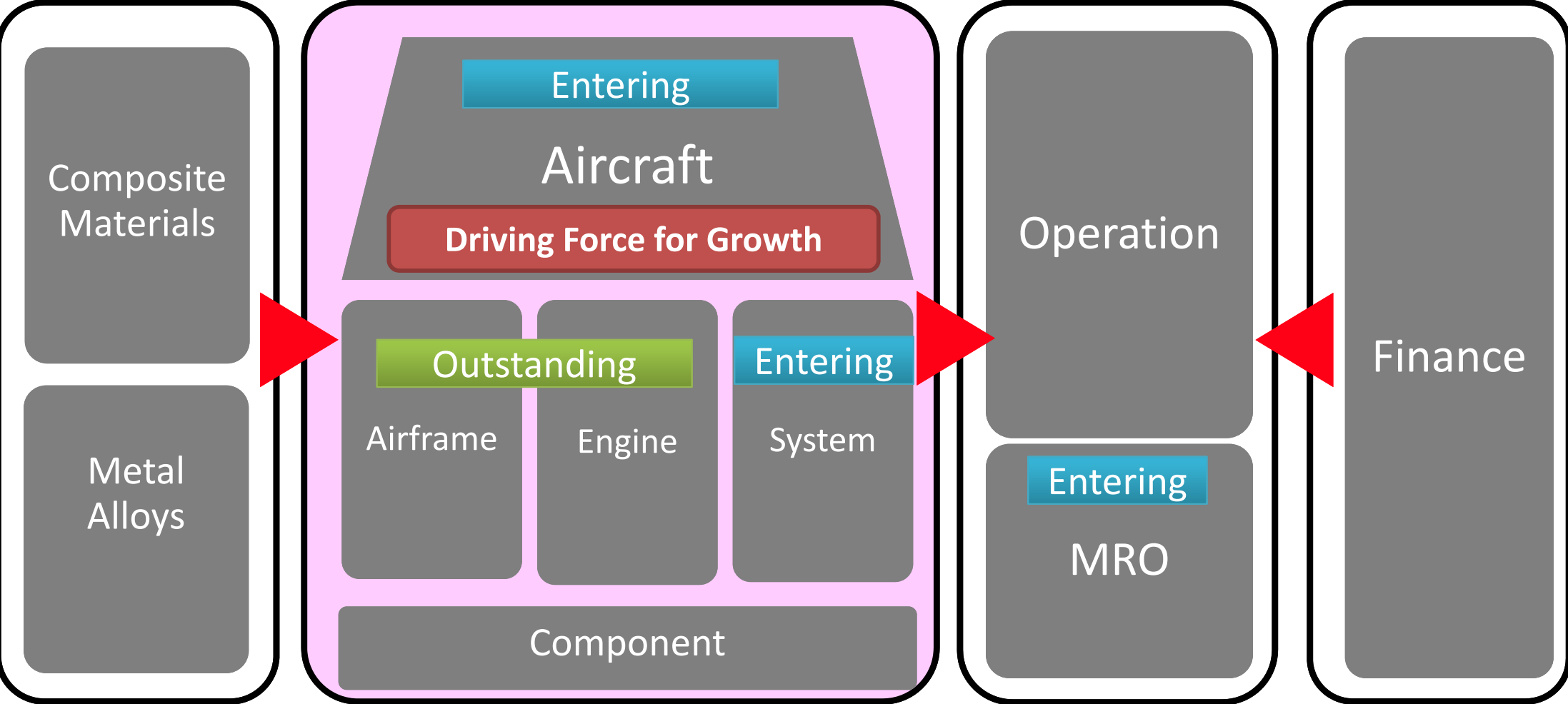
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Structure and Characteristics of Japanese Aircraft Industry

- Aircraft industry is a set of wide range of businesses, including not only manufacturing but also service and financing.
- Airframe and Engine parts manufacturers occupy outstanding position, but whole Aircraft and Systems manufacturers are in entering stage.

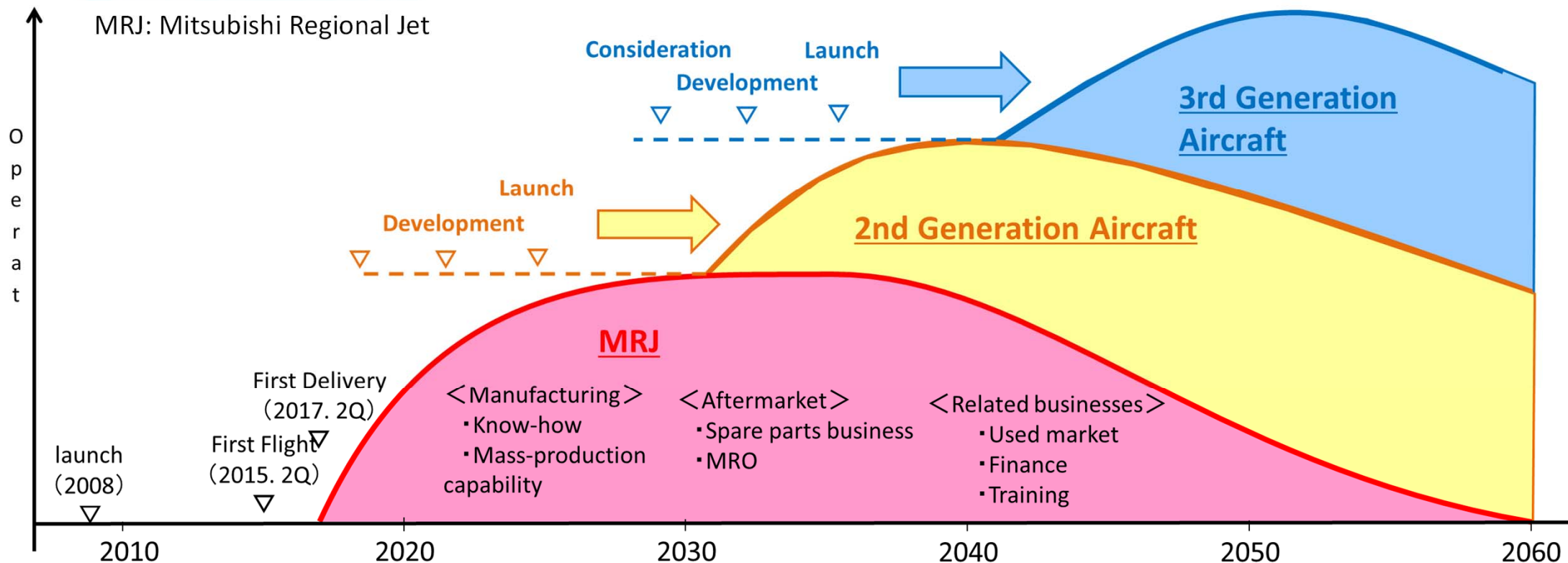


Vision for Future Aircraft Programs

- Following MRJ program, a series of civil aircraft programs are expected to be launched in next decades.
- METI, together with other ministries, will set a business environment for Japanese aircraft industry in collaboration with international partners.

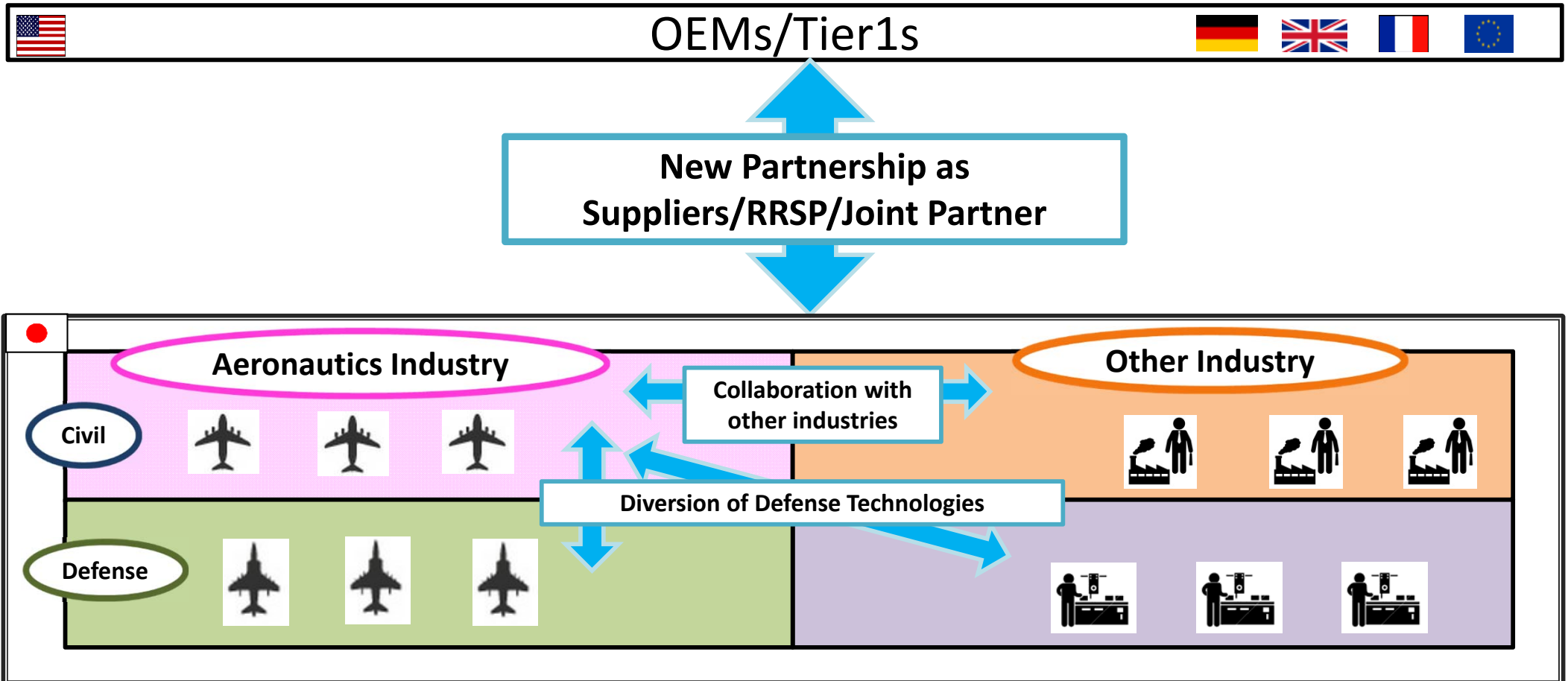


MRJ: Mitsubishi Regional Jet



Our Road to Enhance Competitiveness in Aircraft Systems

- Especially in the aircraft systems industry, it is important to build/strengthen our business relationships with OEMs and Tier 1s, through the 3 stages as below:
 - 1) Short-term: as supplier(s) of parts/products
 - 2) Mid-term: as risk & revenue sharing partner(s) of R&D and engineering
 - 3) Long-term: as joint partner(s) in terms of technological/financial/manufacturing commitment



METI's Policy Framework

- Considering key features of future aircrafts, METI promotes technology development, improves innovation system and encourages industrial partnership.

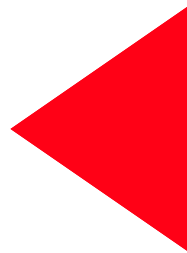
Efficiency

Environment

Safety

Affordability

Value-added



Technology
Development

- Aerodynamics
- **Aircraft systems**
- Advanced materials
- Other key enabling technologies

Innovation
System

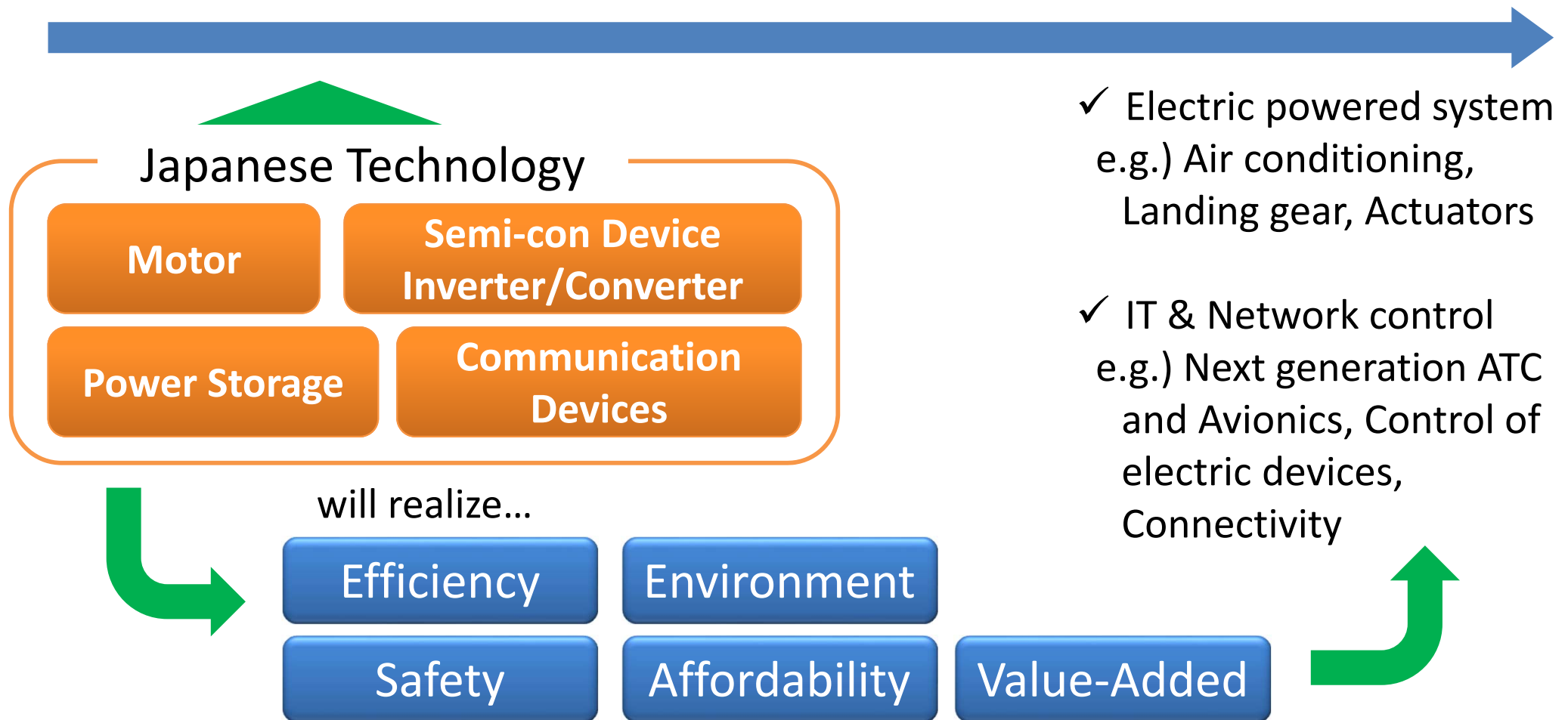
- **Project management system and funding mechanism**
- Testing and demonstration platform and infrastructure
- Regulatory framework (airworthiness and etc.)

Industrial
Partnership

- Vertical and horizontal partnership in a supply chain
- New players from other industries (automobile, electronics)
- **Enhanced partnership with international players**

Vision for Future Aircraft Systems

- “More electric” is the keyword for future aircraft.
- Japan has many potential solutions in aircraft system industry and other industries (e.g. automotive industry, electric industry).



Thank you for your attention!

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