



Space at the Inflection Point

Dennis Muilenburg

Executive Vice President, The Boeing Company

President & CEO, Boeing Defense, Space & Security

13 April 2010



Rapidly Changing, Complex World

- Shifting priorities
- Evolving threats and technology
- Global economic pressures



Iraq

Afghanistan



Iran and North Korea



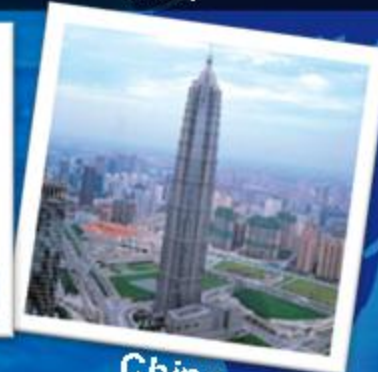
Global Economy



Terrorists



India



China



Evolving Technology

Unprecedented, Simultaneous, Significant Change

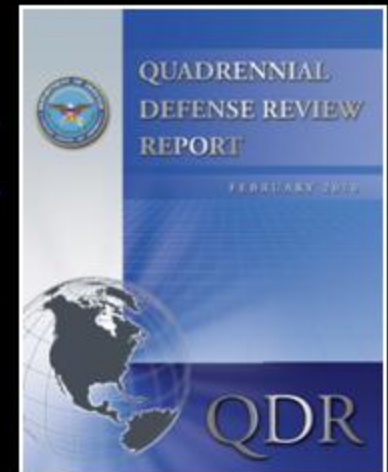
An Inflection Point for Customers: National Security, Civil and Commercial

- How will space be used in the future?
- What is the next chapter in human spaceflight?
- What role will industry play going forward?
- How will we address growing security and economic needs?



An Inflection Point for Industry

- Industrial base stretched thin
- Supply chain challenges
- Workforce challenges
- Acquisition reform



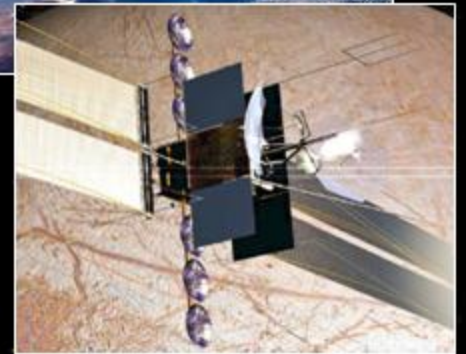
Together, We Must Make the Right Choices

Our choices will determine whether we

- Meet rapidly changing needs of military, government, citizens
- Unleash a new wave of innovation and economic growth
- Maintain America's leadership
- Open the door to next-generation of benefits from space

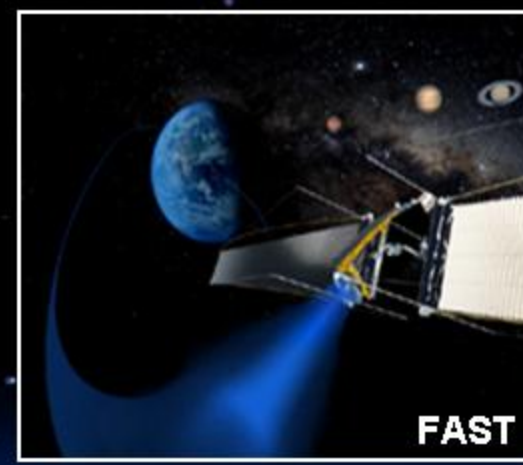
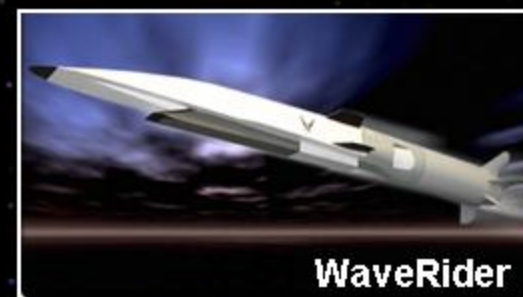
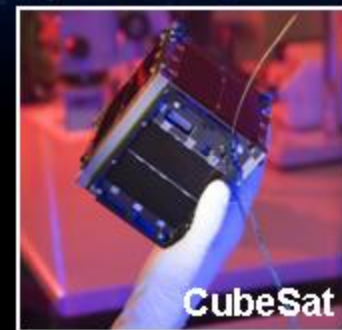


Missions That Demand Excellence



Boeing Investments in the Future: Space & Cyber

- CubeSats
- X-51 WaveRider
- Fast Access Spacecraft Testbed
- Space Based Space Surveillance
- GPS IIF Satellites
- 702MP and hosted payloads
- Cyber protection



SUPPORTING
Missions
that
MATTER



Click image to play video

Our Choices Will Decide the Future

A photograph of three people in a meeting. A man with glasses and a white polo shirt is leaning over a table, looking at a laptop. A woman with long dark hair is sitting at the table, looking at the laptop. Another woman with short brown hair is sitting to the right, looking at the laptop. The scene is dimly lit, with a warm glow from the laptop screen.

Three Critical Areas

1. Talent pipeline
2. Customer connection
3. Government-industry partnership

1. Talent Pipeline

- Half of workforce eligible to retire in 10 years
- Poor retention at 4-5 year point
- Other industries more attractive
- Our industry needs more time to ramp up



A National Security Challenge

Boeing's Efforts to Expand the Talent Pipeline

- Mentoring and leadership development
- Partnerships with universities
- Investments in Science, Technology, Engineering and Math



Boeing Leadership Center



FIRST Robotics



Teachers to Space Camp



Boeing's Cyber Six

2. Customer Connection

To strengthen the customer connection:

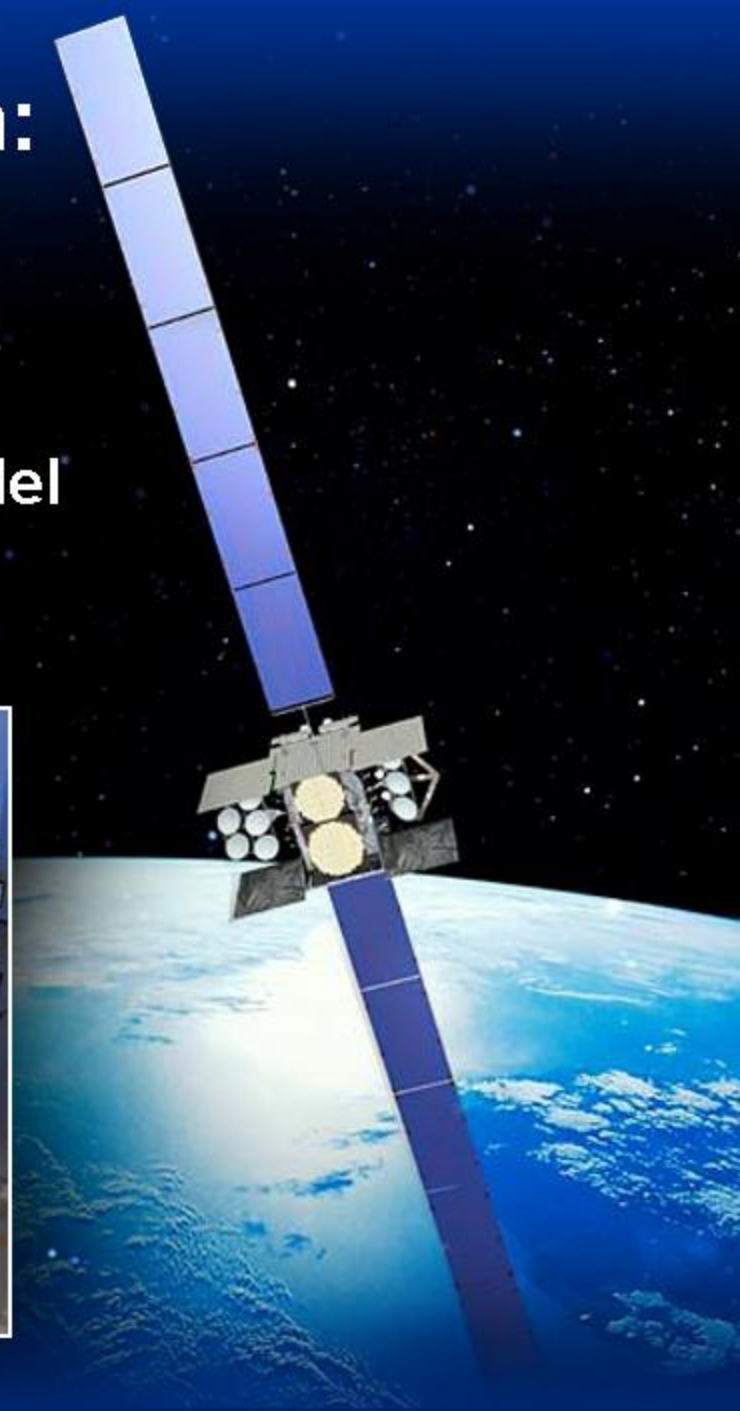
- Listen to one another
- Tell the hard truth
- Strengthen customer intimacy



Customer Voice Is Crucial

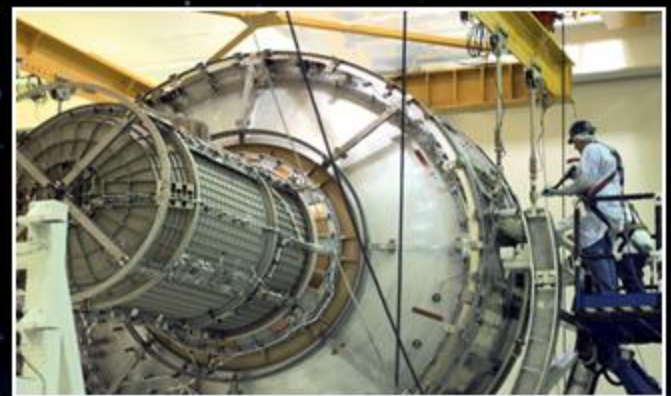
The Power of Collaboration: Wideband Global SATCOM

- WGS: An innovative solution for a growing need
- Boeing-USAF partnership is a model
- Award-winning collaboration



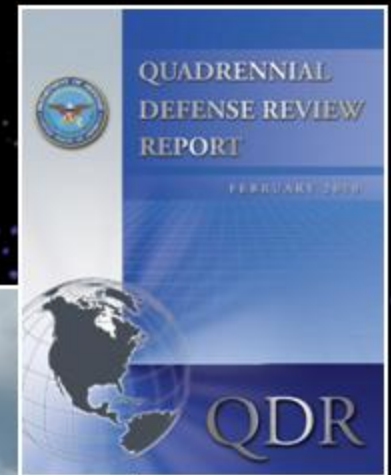
The Power of Global Collaboration: International Space Station

- Largest, most complex international scientific project in history
- World's only in-space research facility
- Partnership of 15 countries and thousands of contractors
- Honored with Collier Trophy and Aviation Week's Laureate Award



3. Government - Industry Partnership

- Rules and regulations: The right mix
- Listening to one another, especially on evolving technologies
- More flexible, nimble acquisition process
 - We endorse acquisition reform
 - Number of ideas being discussed
 - Multiple partnership models being considered





**It all comes back to mission:
*The future of space depends on all of us.***



Space at the Inflection Point

Dennis Muilenburg

Executive Vice President, The Boeing Company

President & CEO, Boeing Defense, Space & Security

13 April 2010

