



Rolls-Royce

**Delivering today,
investing for the future**

Annual General Meeting 2010

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Sir John Rose, Chief Executive

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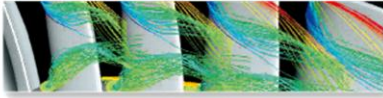
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Mission critical power systems strategy



Address
four global markets



Invest
in technology, capability and infrastructure



Develop
a competitive portfolio of products and services



Grow
market share and installed product base

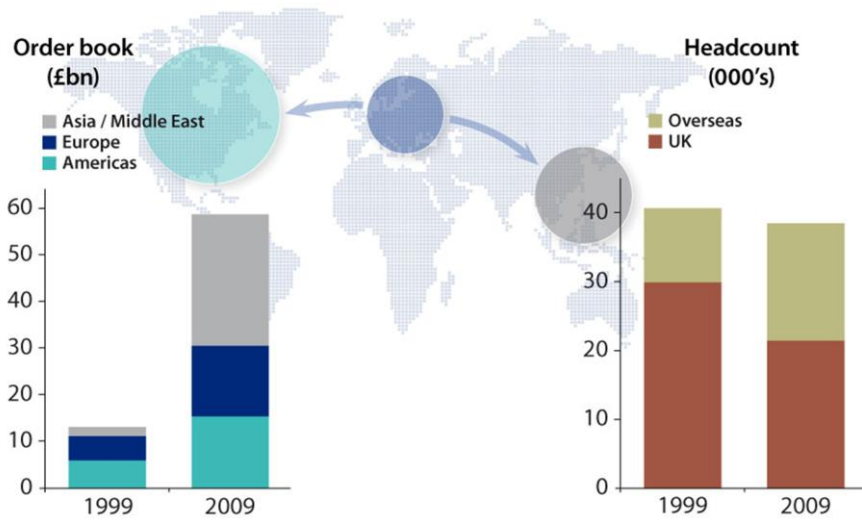


Add value
for customers through product related services



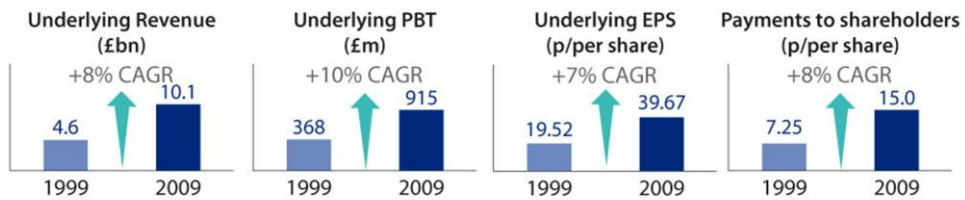
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A business transformed



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A business transformed



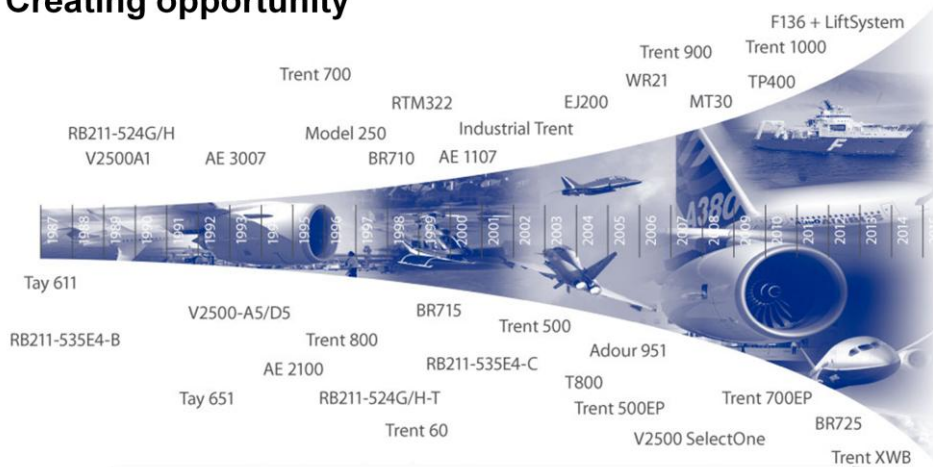
Delivering growth



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Technology expanding the portfolio

Creating opportunity



Underpinning long-term growth



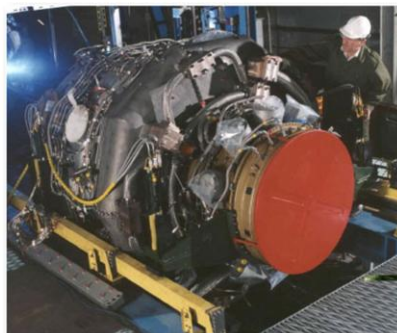
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New product introduction

Two major new programmes in 1999



**Certification of
Trent 500**



**Endurance testing
of WR21**



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2009 – New product introduction



LCS – USS Freedom
Completed sea trials
15th June 2009



Type 45 – HMS Daring
1st commissioned
23rd July 2009



Legacy 650
1st flight
23rd September 2009



MANTIS UAV
1st flight
21st October 2009



Lynx Wildcat
1st flight
12th November 2009



Astute
1st voyage
15th November 2009



Gulfstream G650
1st flight
25th November 2009



Airbus A400M
1st flight
11th December 2009



Boeing 787
1st flight
15th December 2009



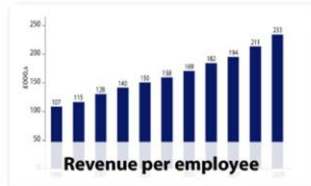
JSF
1st STOVL engagement
7th January 2010

Platform for growth



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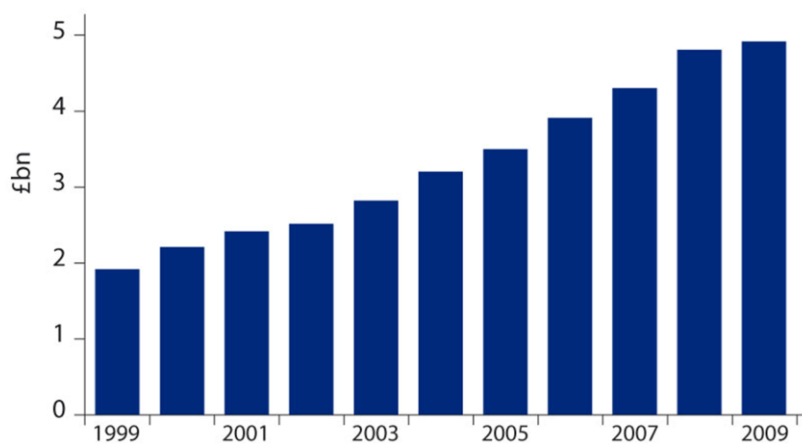
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Services – a trusted partner

Adding value for our customers and Rolls-Royce

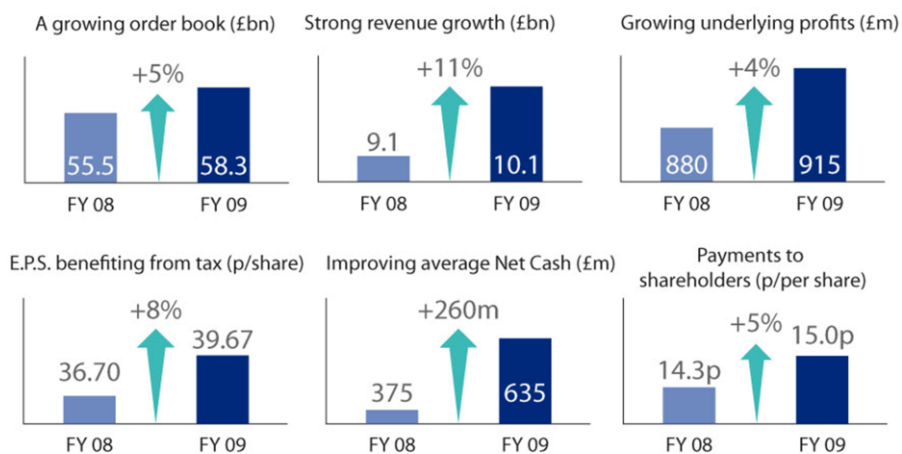


Compound growth of 10% over past 10 years



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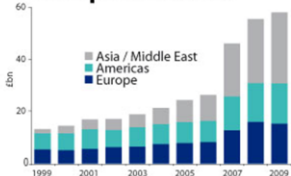
2009 – A solid performance



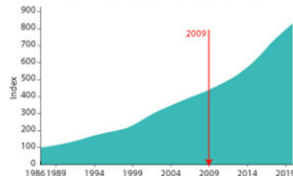
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Positioned for growth

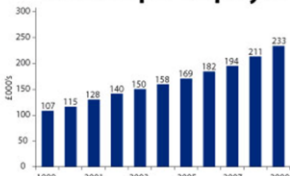
Group order book



Civil installed thrust



Revenue per employee



- Broadly based, better balanced
- Record order book
- Good market access
- Growing installed base
- New programmes
- World class facilities
- Focus on productivity

**Expect to double revenues
over the next decade**



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Outlook

- Broadly based, well balanced portfolio with a strong financial position – well positioned to double revenues over a decade
- For 2010, we continue to expect:
 - Underlying revenues, profits and average net cash to be broadly similar to those achieved in 2009



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