



**WE ARE LEADING  
THE STARTUP  
REVOLUTION  
IN THE AEROSPACE INDUSTRY**



# Conclusion

Once again, two paths are ahead of us

BRAND CAMP

by Tom Fishburne

OUR LATEST INNOVATION  
IS A GOOSE THAT LAYS  
EGGS OF SOLID GOLD

THAT'S A DISTRACTION  
FROM OUR CORE

AND WE HAVE  
NO BUDGET FOR  
GOOSE-RELATED  
EXPENSES

ON THAT NOTE,  
WE'LL NEED  
THE FEATHERS  
AND LIVER  
FOR ANOTHER  
PROJECT



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# Industry dynamics : A paradigm shift

Is the New economy outpacing national emerging aerospace champions as a threat to established Aerospace players ?



## New competitors are coming both from established and emerging countries



-  Established aerospace clusters
-  New competitors supported by emerging aerospace countries
-  New competitors supported by legacy aerospace players

## Aerospace is still massively concentrated around European and North American clusters

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  - ▶ Top 15 players are American or Western European, with an aggregate annual turnover amounting to **\$500 Bil. in 2013**
  - ▶ Commercial aviation remains highly concentrated around the **Airbus & Boeing duopoly** and their heavy-weight Tier 1 suppliers
  - ▶ This results in **strong eco-systems and innovation clusters in North America and Western Europe**

## National aerospace champions have traditionally been seen as the next entrants

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  - ▶ Embraer, Bombardier are well established but are still niche players
  - ▶ Comac outpaces Irkut, Mitsubishi,...

## Players of the new economy have appeared dramatically with un-precedented speed and resources

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  - ▶ Newcomers entering **laterally** like **Space X** highly supported by NASA
  - ▶ Newcomers present in **adjacent** markets and entering the market vertically: **Google**



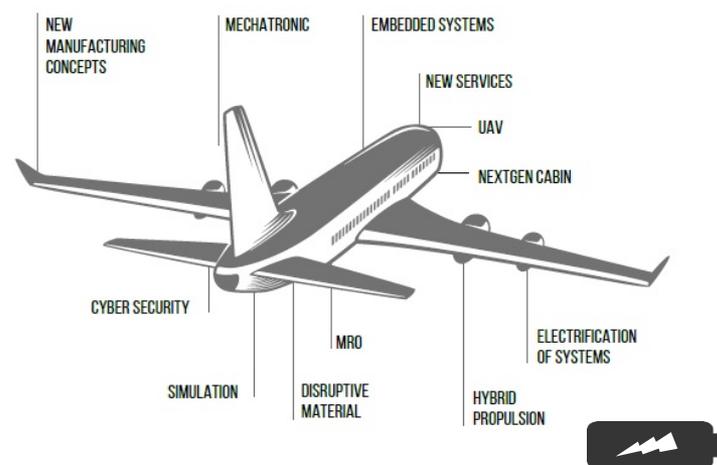
# Domain focus

Target start-ups will cover processes, business models and products relevant to the aerospace and defense sector

## Main emerging domain for start-ups

-  ▶ New Space (micro-satellites, launchers...) and their applications
-  ▶ Big data / Algorithmics
-  ▶ UAVs
-  ▶ New passenger experience
-  ▶ Services (flight data and sensors)
-  ▶ Energy Management (Storage and Transmission)
-  ▶ Smart airports
-  ▶ Factory of the Future (Manufacturing and Intellectual Production, Paperless Processes and Virtual Reality)
-  ▶ Autonomous Vehicles
-  ▶ Robotics
-  ▶ Cyber security

## Detailed focus of the emerging aircraft domains



**All types of innovations will be of interest: from pure technologies to materials, process, integration, customer experience, digitalization and business models**

# The startup environment: Strong ecosystems driven by core cities

The 2015 Startup Ecosystem Report\* shows Silicon Valley - and more widely US - leadership while Europe positions itself as a new solid startup ecosystem



	Ranking		Performance	Funding	Market Reach	Talent	Startup Exp.	Growth Index
Silicon Valley	1	◀	1	1	4	1	1	2.1
New York City	2	▲ 3	2	2	1	9	4	1.8
Los Angeles	3	◀	4	4	2	10	5	1.8
Boston	4	▲ 2	3	3	7	12	7	2.7
Tel Aviv	5	▼ 3	6	5	13	3	6	2.9
London	6	▲ 1	5	10	3	7	13	3.3
Chicago	7	▲ 3	8	12	5	11	14	2.8
Seattle	8	▼ 4	12	11	12	4	3	2.1
Berlin	9	▲ 6	7	8	19	8	8	10
Singapore	10	▲ 7	11	9	9	20	9	1.9
Paris	11	◀	13	13	6	16	15	1.3
Sao Paulo	12	▲ 1	9	7	11	19	19	3.5
Moscow	13	▲ 1	17	15	8	2	20	1.0
Austin	14	NEW	16	14	18	5	2	1.9
Bangalore	15	▲ 4	10	6	20	17	12	4.9
Sydney	16	▼ 4	20	16	17	6	10	1.1
Toronto	17	▼ 9	14	18	14	15	18	1.3
Vancouver	18	▼ 9	18	19	15	14	11	1.2
Amsterdam	19	NEW	15	20	10	18	16	3.0
Montreal	20	NEW	19	17	16	13	17	1.5



# City location

In USA, Los Angeles is the best combination between startup ecofriendly environment and Aerospace background, in EU is Paris

## Used by CTOs, this city ranking illustrates why Los Angeles & Paris are the best locations in USA & Europe for Starburst



A distinct hierarchy in startup environment:

- **US Supremacy**, with 7/10 Top cities and 4 main clusters
- **Europe Emergence**, with 5 cities in Top 20
- **Tel-Aviv strong but isolated** position

**Trendsetter Index** is seen as a strong indicator of the ecosystem future performance.

LOS ANGELES		3
STARTUP INPUT	Population & Maturity	2
FUNDING	Active Capital Risk level	4
PERFORMANCE	Current & Potential performance	4
TALENT	Funders background	10
SUPPORT	Services, funding, Mentors	2
MINDSET	Entrepreneurial Attitude	5
TRENDSETTER	Rapidity in evolving	5
DIFFERENTIATION	from SV	2

\*The 2015 Startup Ecosystem Report is seen as the global reference to understand startup clusters and innovation ecosystems. The index is based on data from 50 000+ startups who are using the Startup Genome's Startup Compass (business tool).



AEROSPACE INNOVATION HUB  
**INVESTING**  
**IN THE FUTURE**  
**RIGHT HERE. RIGHT NOW.**

**WE ARE**



**STARBURST**  
ACCELERATOR



**WE ARE  
CHANGING  
INNOVATION  
IN THE AEROSPACE  
INDUSTRY**



**WE ARE  
CONNECTING  
LEGACY AEROSPACE  
WITH INNOVATIVE  
STARTUPS**



**WE ARE  
SUPPORTING  
LABS TO INDUSTRY  
THROUGH STARTUPS**

# OUR BUSINESS MODEL:

€ SERVICE BASED FEES FOR CORPORATE PARTNERS AND STARTUPS

 SUCCESS FEE ON SALES GENERATED FOR THE STARTUP AND MONEY RAISED

✘ NO EQUITY

# INNOVATION TERRITORIES INCLUDE:



AIRCRAFT



SPACECRAFT



SATELLITES



COMMUNICATIONS RADAR



HELICOPTERS



DRONES



SENSORS



ALGORITHMS



SOFTWARE



ANTENNAS



DEVICES



ARTIFICIAL INTELLIGENCE

# WE ARE RUNNING OPEN INNOVATION PROGRAMS FOR LEGACY PARTNERS BY:



SCOUTING IDEAL STARTUPS



PRESELECTING STARTUPS



FACILITATING CONNECTIONS WITH SELECTED STARTUPS

# WE ARE SUPPORTING STARTUPS OUT OF LABS BY:



FACILITATING THEIR CREATION



ACCELERATING THEIR BUSINESS DEVELOPMENT AND THEIR ACCESS TO FUNDING

**WE ARE CONNECTED WITH 50 LABS  
AND UNIVERSITIES IN BOTH EUROPE AND THE U.S.**





**WE ARE  
MAPPING  
THE FUTURE  
2020**



# THE BIRTH OF THE IDEA IN PARIS

# 2012



**20 STARTUPS IN FRANCE**  
**2013**



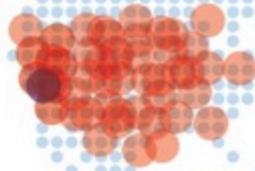
**50 STARTUPS IN EUROPE**  
**2014**



L.A. OFFICE OPENS  
2015



100 STARTUPS IN EUROPE  
2015



# 50 STARTUPS IN U.S.

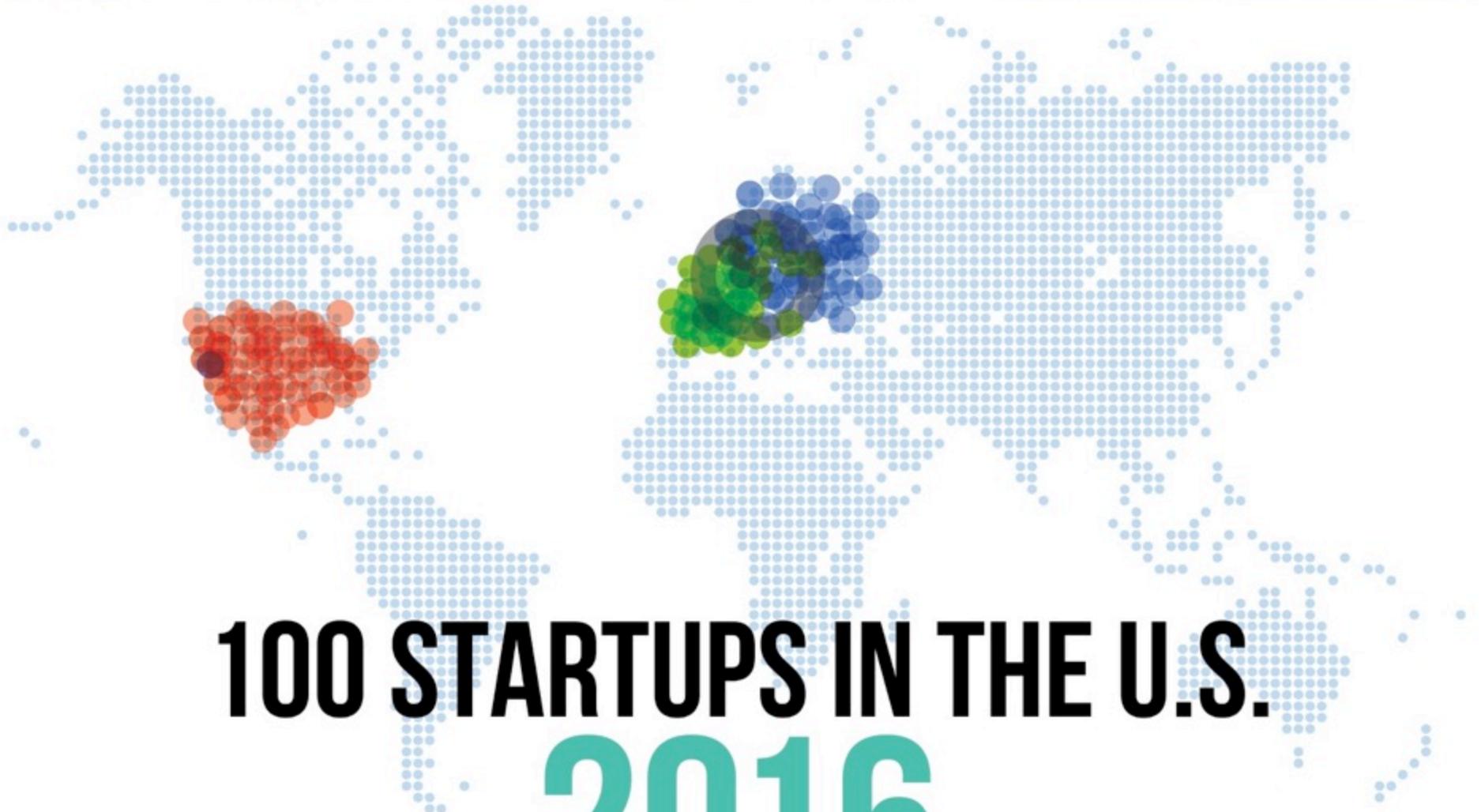
# 2015



A world map composed of light blue dots. Three clusters of larger, semi-transparent colored dots are overlaid on the map: a red cluster in North America, a green and blue cluster in Europe, and a blue cluster in Asia.

# START OF SATELLITES IN EUROPE

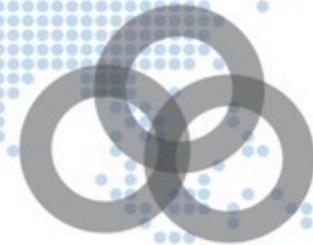
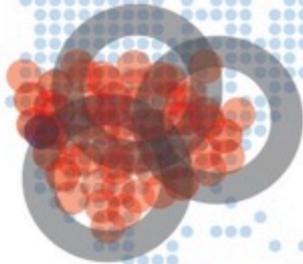
# 2015



100 STARTUPS IN THE U.S.  
2016



# MORE SATELLITES 2016



# START OF SATELLITES IN U.S. & ASIA

# 2016



300 STARTUPS GLOBALLY  
2020



**WE ARE  
BRINGING  
THE FUTURE  
TO YOU**



**WE ARE  
ACCELERATING  
THE FUTURE**





**WE ARE  
REDEFINING  
THE AEROSPACE  
INDUSTRY**