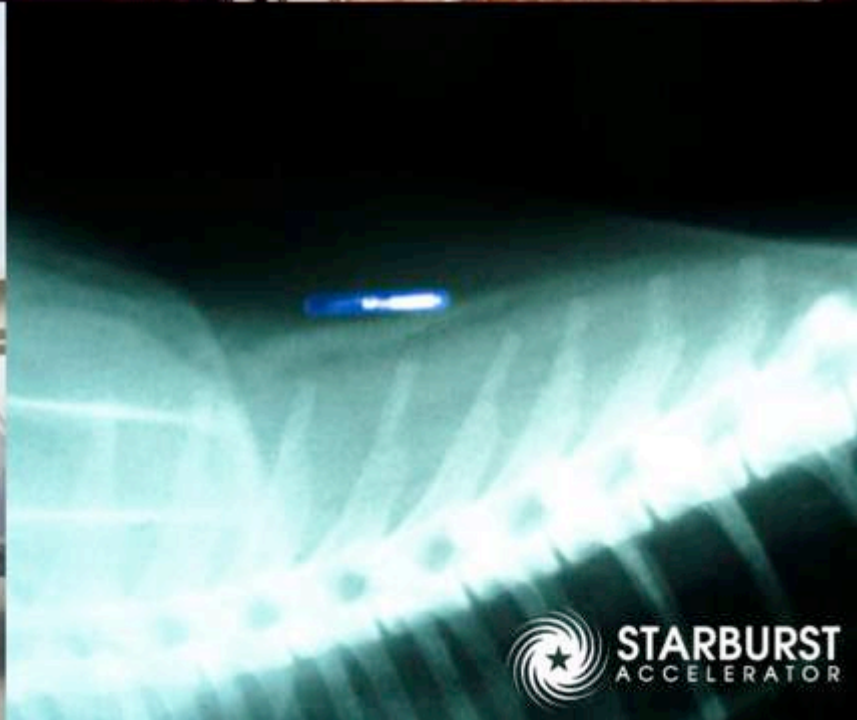
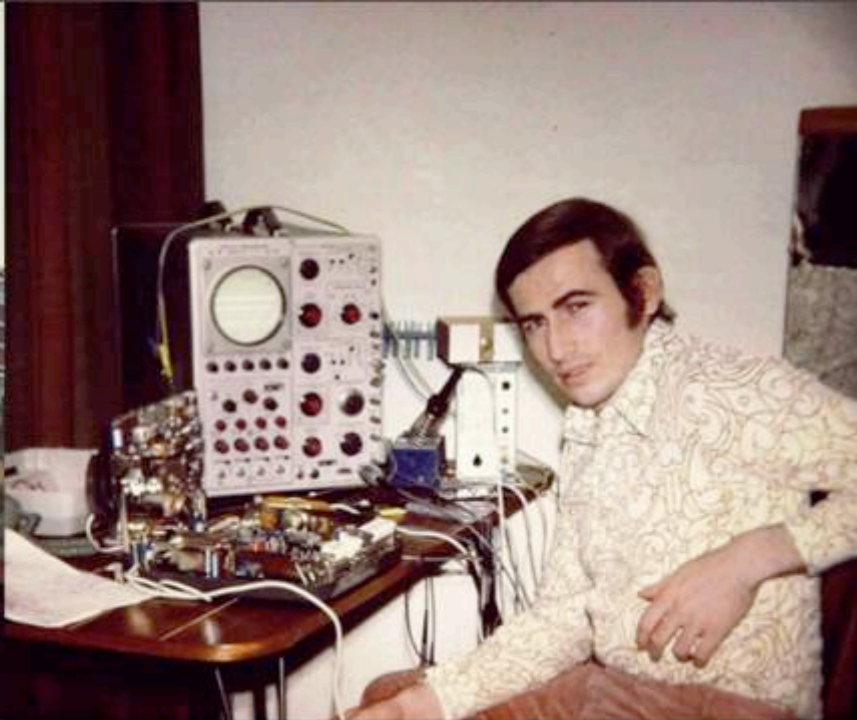




STARBURST
ACCELERATOR

**AEROSPACE INNOVATION
IN ACTION**
APR 2017



1963



2016



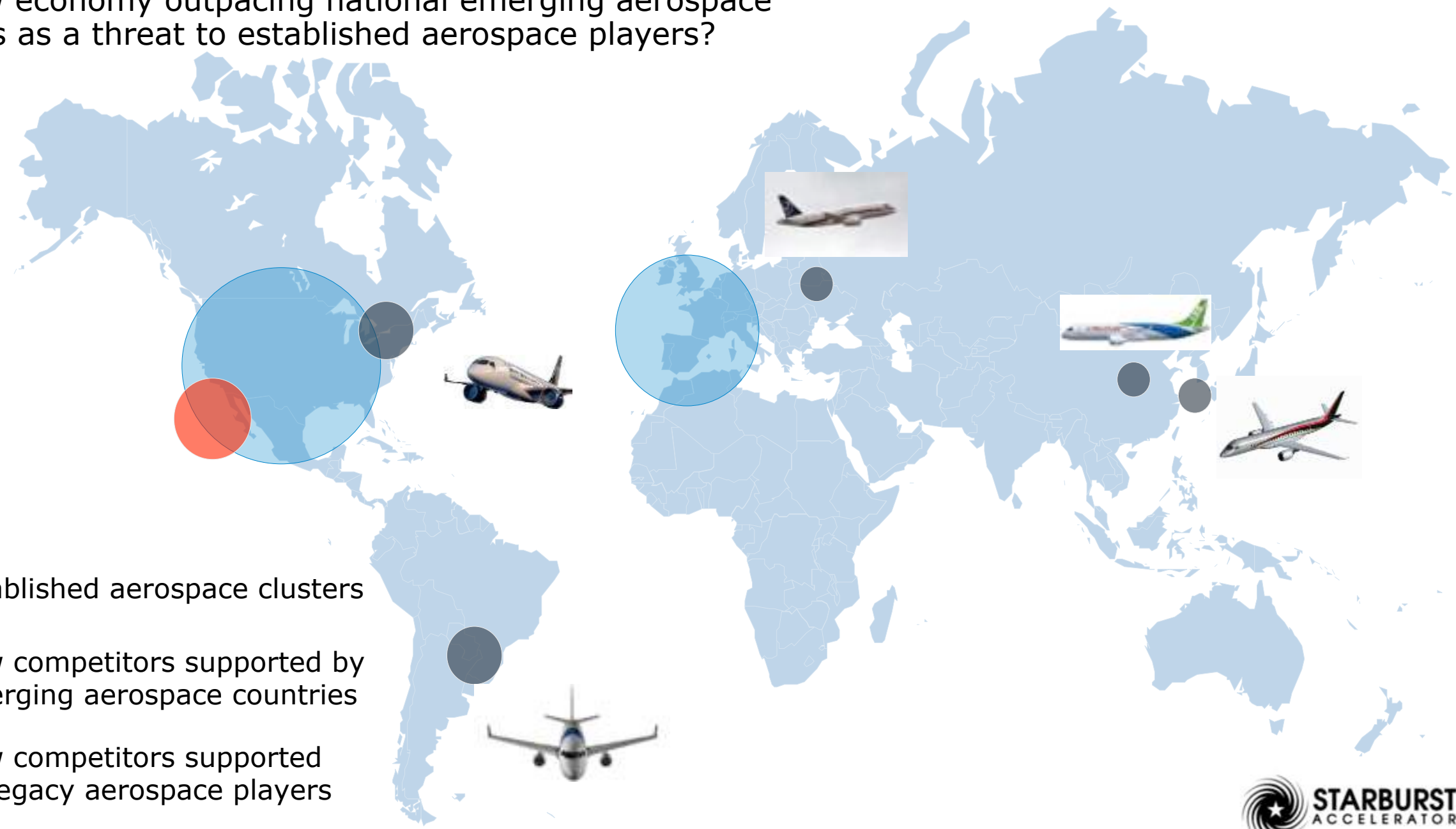
***"if you look at the design of commercial aircraft,
we still look like the 60's" - Tom Enders***








INDUSTRY DYNAMICS: A PARADIGM SHIFT

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



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

The startup environment: Strong ecosystems driven by core cities

The *Startup Ecosystem Report** shows Silicon Valley - and more widely US leadership while Canada emerges



	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

Cities

In the US, Los Angeles is the ideal cross for startup eco-friendly and aerospace

This city ranking illustrates opportunities in Toronto, Vancouver & Montreal



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.

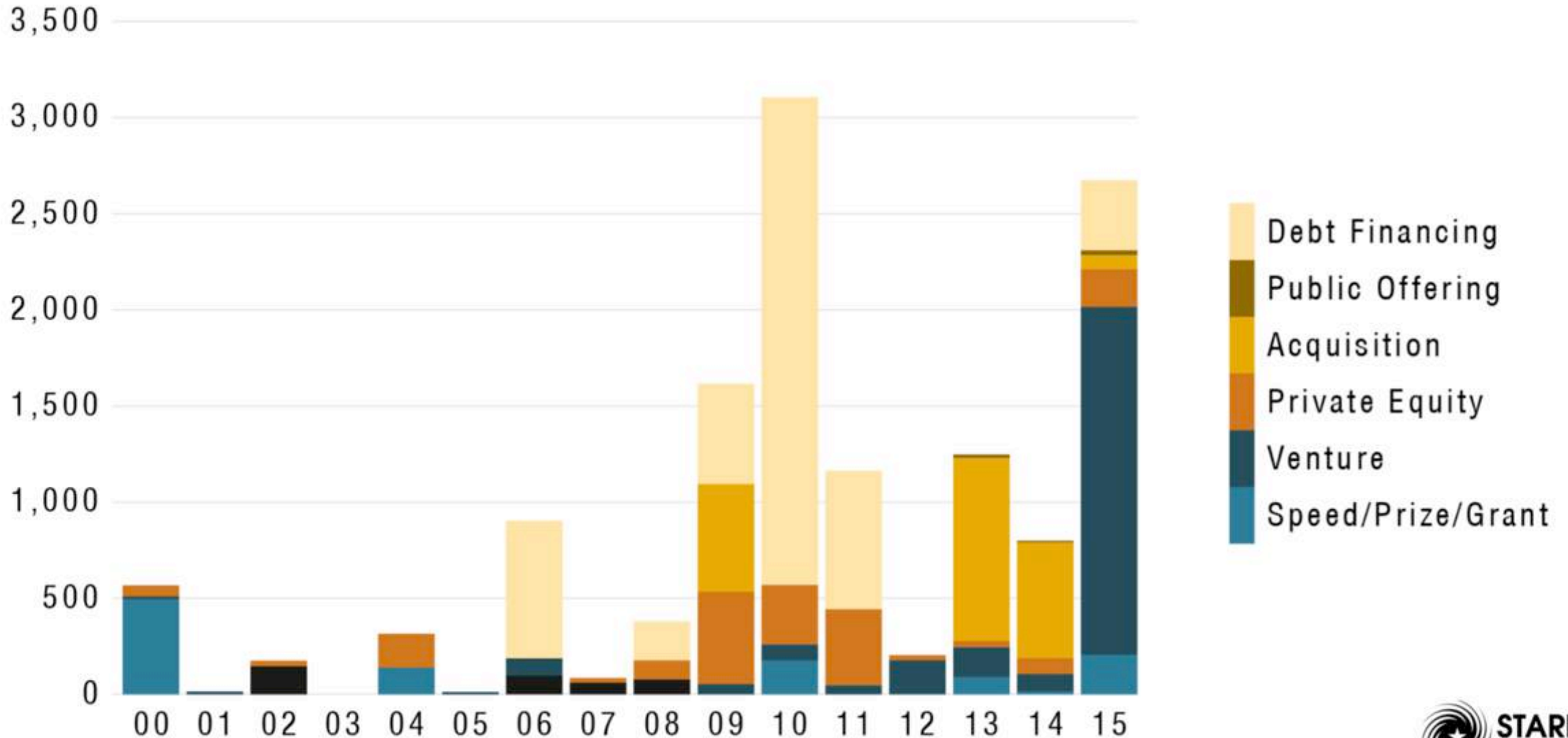
LOS ANGELES		3
STARTUP INPUT	Population & Maturity	2
FUNDING	Active Capital Risk level	4
PERFORMANCE	Current & Potential performance	4
TALENT	Funders background	10
SUPPORT	Services, funding, Mentors	2
MINDSET	Entrepreneurial Attitude	5
TRENDSETTER	Rapidity in evolving	5
DIFFERENTIATION	from SV	2

*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).



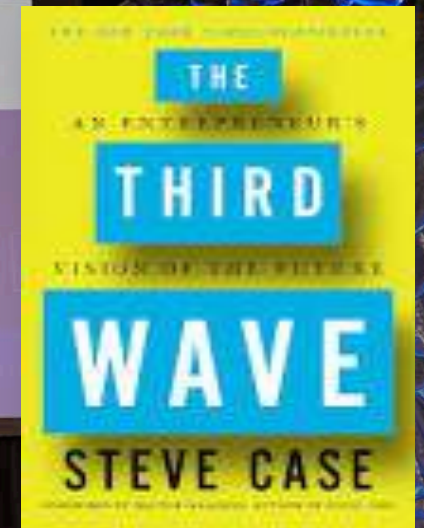
THE TAURI GROUP

Magnitude of Investment in Start-Up Space Ventures



“The third wave is going to be partnerships between startups with really good ideas and move really quickly, and large organizations that have tremendous scale, credibility and understanding of the environment and distribution channels. How do you bring those forces together so the small companies can get a lot more traction than they might on their own, and big companies can stay relevant and be more agile?”

– Steve Case (AOL)



Beth Comstock, Vice Chair, General Electric
Jason Tanz, WIRED

Starburst Positioning



STARTUPS

- **Contacts** for first contracts
- **Funding** support
- **Growth** consulting

Business
Development



Innovation
Management



CORPORATES

- Innovation **scouting**
- **Cooperation** with startups
- Innovation **consulting**

Investment
Opportunities



FINANCIAL INVESTORS





- **Deal flow** for investment partners
- Due Diligence support
- Set up of Starburst venture fund

- ✓ Aerospace industry focus
- ✓ Worldwide network
- ✓ Leading expertise in Open Innovation and Innovation Management
- ✓ Corporate and startup experience
- ✓ Years of experience in deal creation
- ✓ Focus on mature startups

Domain focus

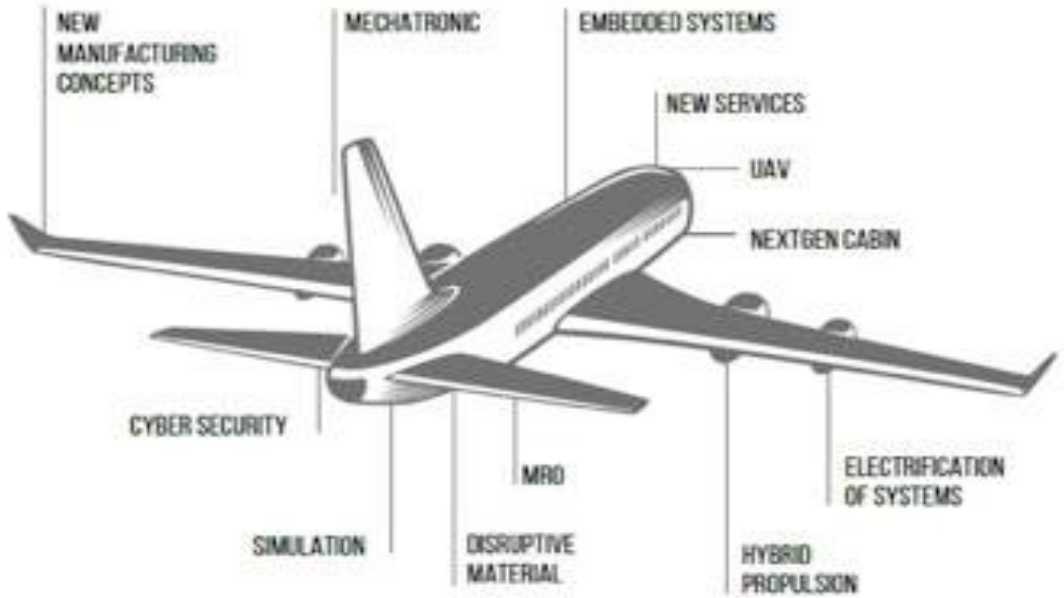
Target startups that cover processes, business models and products relevant to the aerospace sector

Main emerging domain for start-ups

-  ▶ New Space (micro-satellites, launchers...) and their applications
-  ▶ Big data / Algorithms
-  ▶ 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



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300 STARTUPS GLOBALLY
2016

TERRAFUGIA[®]





LILIUM

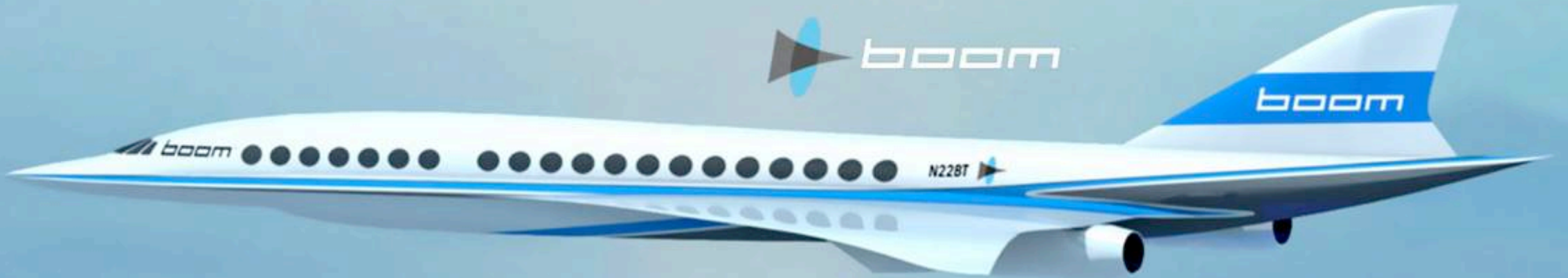
AVIATION



AERION
CORPORATION



 boom

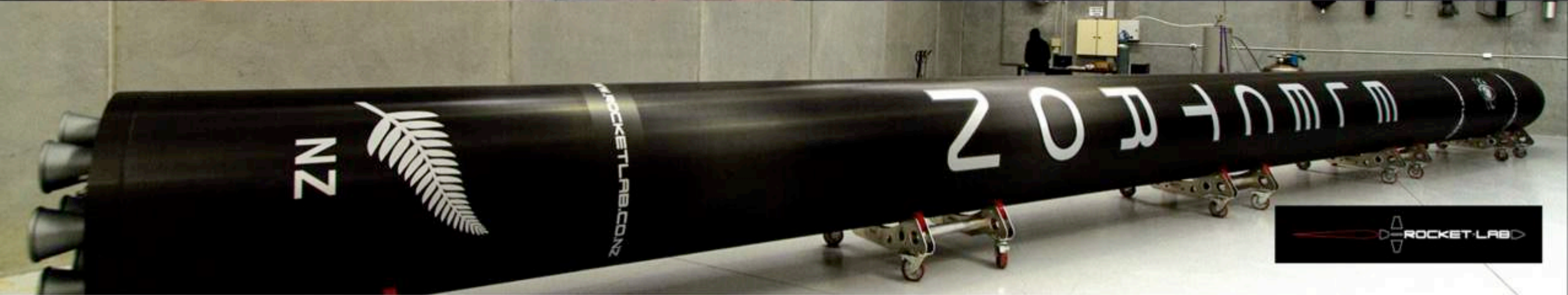


SPIKE
AEROSPACE





BLUE ORIGIN



SOLARIMPULSE

EXPLORATION TO CHANGE THE WORLD

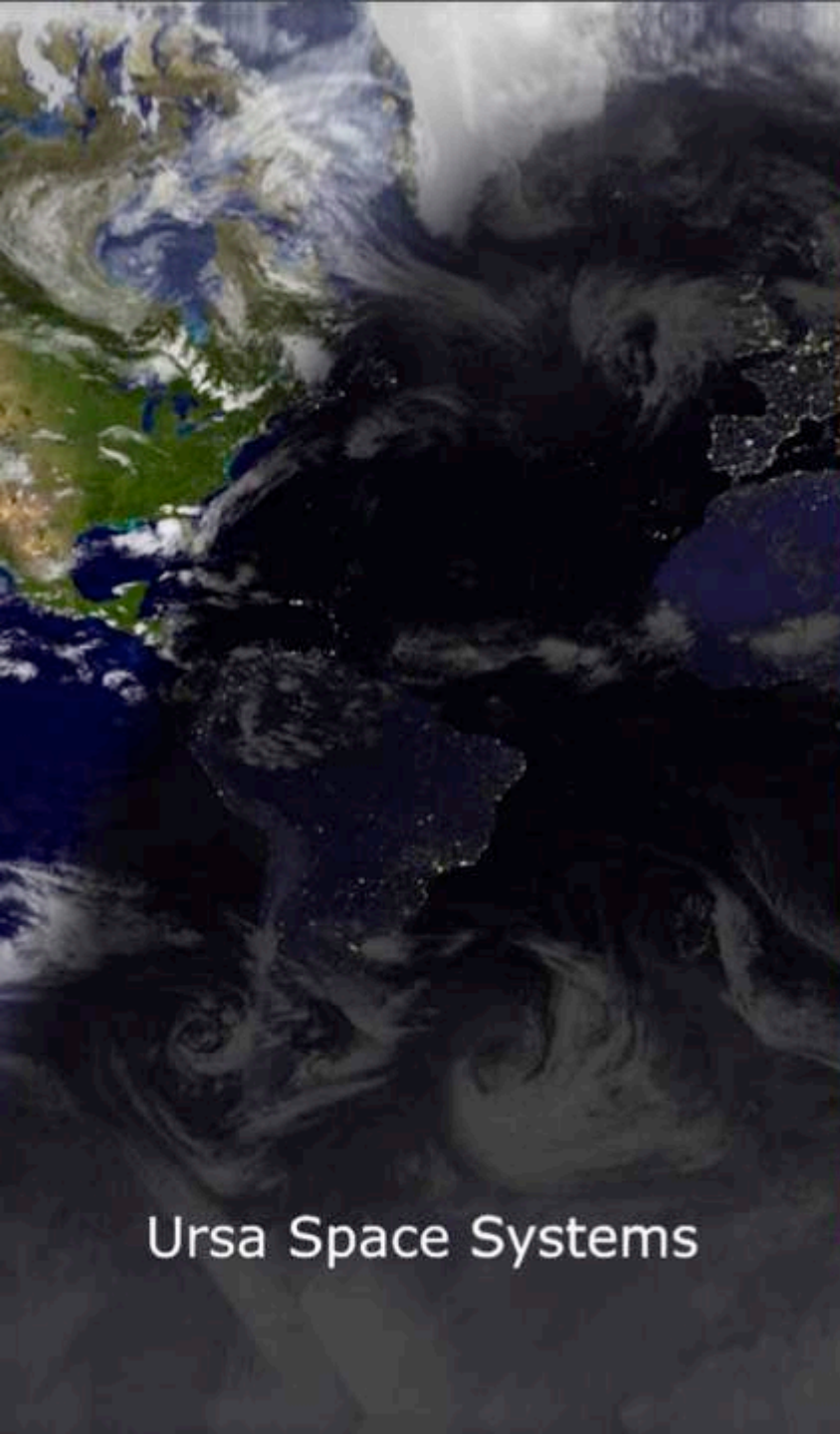


TITAN
AEROSPACE

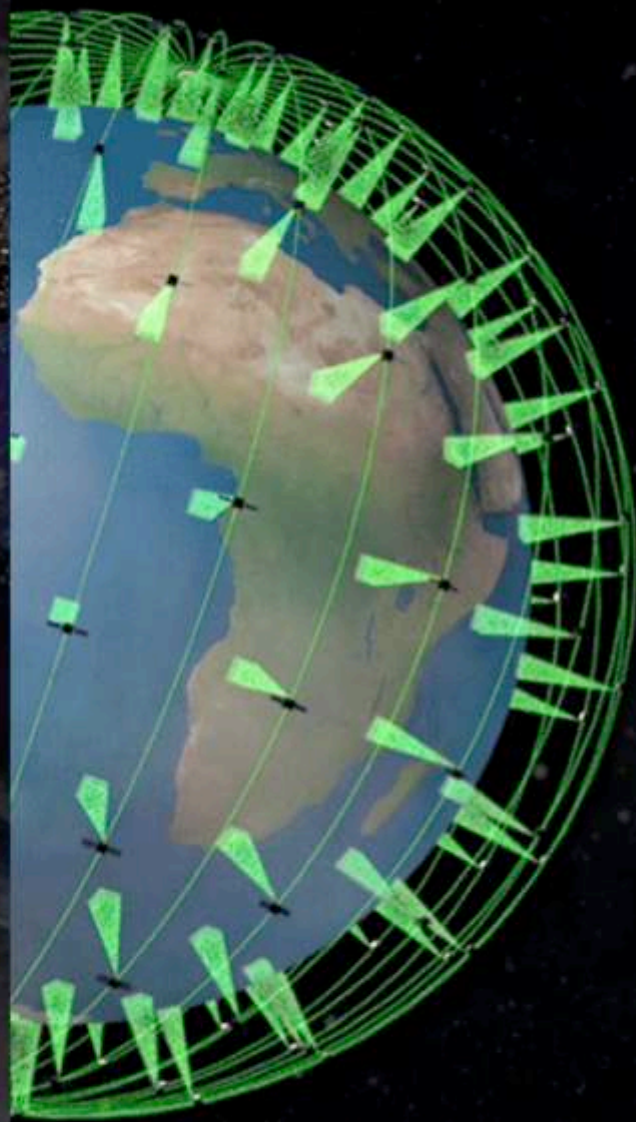


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