

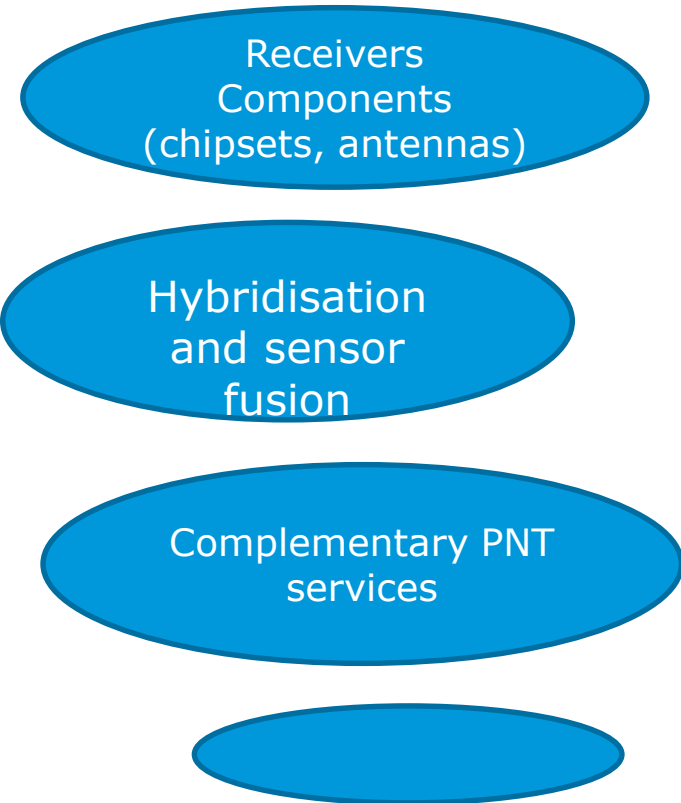
NAVISP Element 2

*NAVISP Industry Days
22 and 23 January 2020
ESA-ESTEC*

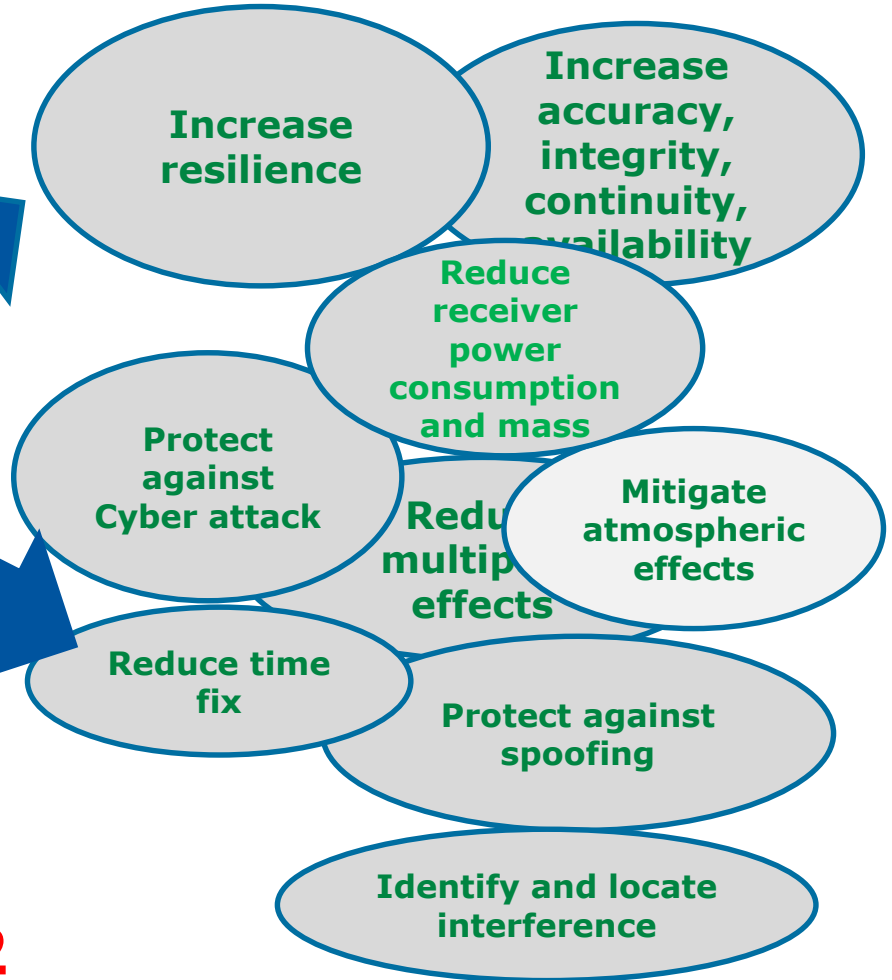
Context

- ❑ Further penetrate existing market sectors with enhanced/new applications :
- ❑ new market sectors ?

New techniques and products



Common requirements&challenges



NAVISP Element 2

Objectives

*fostering European industry competitiveness in the PNT sector
enabling the emergence of new products ready for commercialisation*

- To ensure the readiness of the industry to effectively respond to emerging market opportunities by focusing its activities on products ready for the commercial or institutional market

- To mitigate the relevant risks, namely:
 - ✓ Technology risks: relevant to technology readiness, ability to deliver the targeted performance
 - ✓ Market and business risks: relevant to the uncertainty of commercial success of the developed technology, to the development and implementation of new business models with considerable high-risk/high-potential returns
 - ✓ Regulatory risks: Difficulty in developing products or services by market regulatory barriers or dominant position of incumbent suppliers

Characteristics

supporting industry initiatives and Participating States policies

- Wide range of market sectors to be addressed
- Wide range of products to be addressed all along the value chain
- Different innovation stages to manage
- Wide range of activities nature and costs

- Wide range of companies to cooperate with, including SME start ups and new comers
- Boost cross fertilisation space/non space
- Leave the role to industry in defining and proposing products oriented to commercial or institutional opportunities
- Focus on deliver a product ready for commercial exploitation in public and private markets
- Share the funding of the initiatives

- Link to the national industrial policy of the participating States

Implementation

with a flexible instrument

- A transversal programme organisation to fully benefit from ESA competences
- A permanent Open Call for Proposals ... to keep the door always open
- A »facilitating mode » to support SME and new comers
- A streamlined procurement process
- A structured and systematic consultation with the national Delegations

Implementation

A non ESA centric and dedicated to the industry

- Supporting competitiveness:
 - ✓ Contract in direct negotiation
 - ✓ IPR left to the companies
 - ✓ Ownership of the deliverables left to the companies upon completion of the contract
 - ✓ Business model and product commercialisation plans
 - ✓ All information is treated as commercial sensitive

- Favoring SME, start ups and new comers
 - 80% co-funding for SME
 - ✓ 35% advanced payment for SME, also if subcos
 - ✓ ESA in “facilitating mode”:Interaction with Tenderers

- Streamlined and agile procurement process with the objective to award contract by four months from Outline Proposal
 - ✓ Detailed guidelines and templates available on EMITS under CfP AO8927
 - ✓ Simplified Internal procedures and tools
 - ✓ Tight procurement activities planning

Status and results

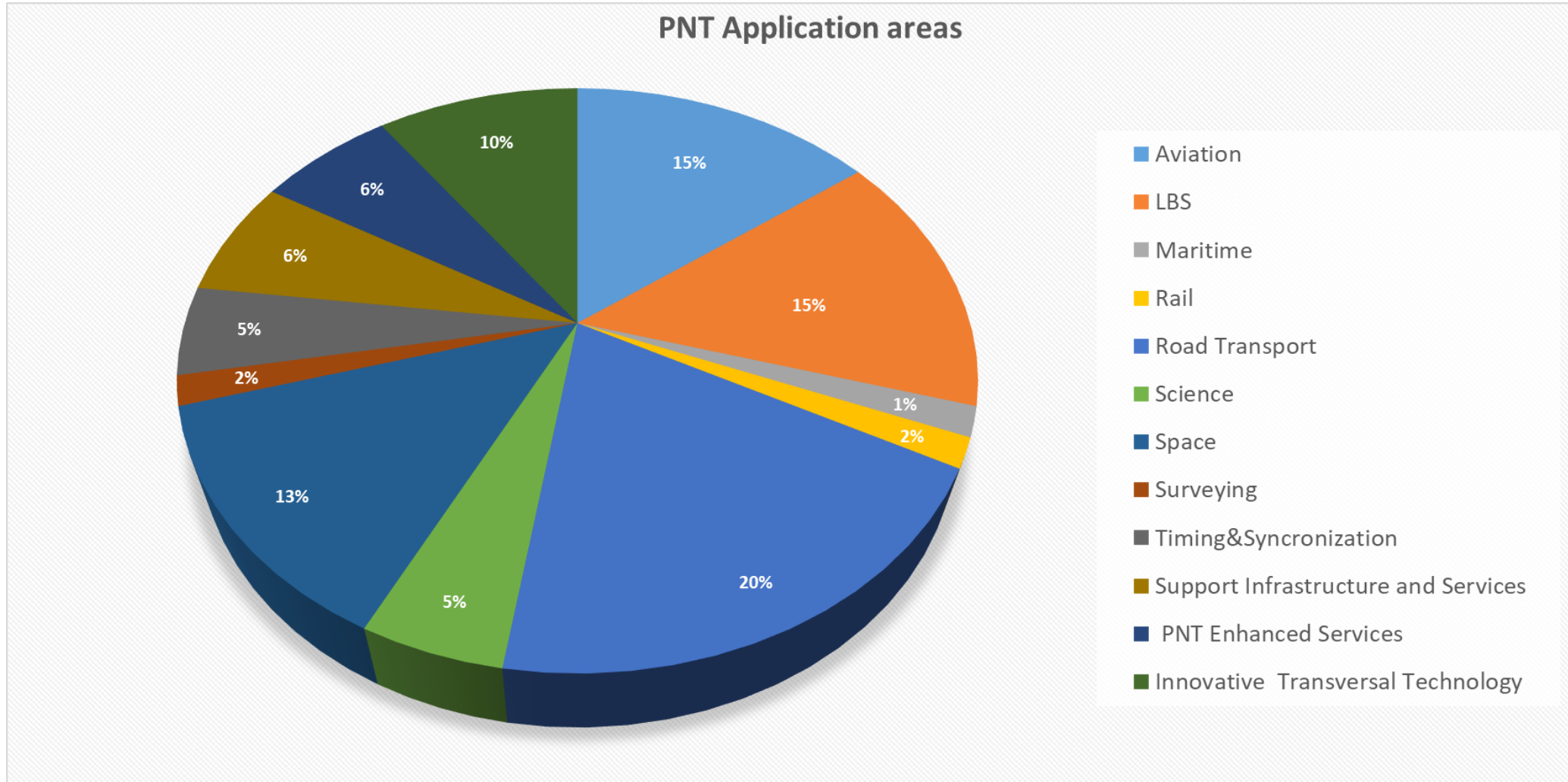
implemented at a very fast pace

- Out of the 60 Outline Proposals positively assessed and supported by the Delegation :
 - ✓ 51 Full Proposals have been received
 - 40 have been contracted and projects are on going. 3 are concluded
 - 10 are under evaluation
 - 1 is pending the Letter of Support
 - ✓ 9 Full Proposals are still to be submitted.

- 67% of the available funds of Phase 1 are engaged.

Status and results

a wide range of market sectors



Status and results

Nature of activities

- Activities addressed
 - Existing markets, few new ones
 - Product evolution and update, very few disruptive products
 - Technology pushed, emphasis on commercialisation to be increased
 - Wide range of costs (from 40 K€ to 2.5 M€)

Nature of actors involved

- 61 % of prime are SME
- 15 consortia with private/public actors
- 16 actors approaching ESA for the first time as prime
- 37 actors (prime and subcos) approaching ESA for the first time (40% of all actors)

Status

Industrial Actors approaching ESA for the first time

Out of 30 industrial actors

- Components manufacturers: 8 (4UK, 1 IT, 1 CA, 1AT, 1 FI)
- Added value services (simulators, PNT enhanced services) : 11 (4UK, 1IT, 1RO, 2CA, 1SE, 1FR, 1AT)
- System integrators belonging to market sectors non space: 11
 - energy : 2 (UK and NL)
 - timing : 2 (UK and ES)
 - aviation: 3 (2UK and 1 AT)
 - robotics: 1 (SE)
 - road: 2 (UK and PO)
 - ICT: 1 (UK)

Conclusions

- Element 2 is an opportunity for a wide range of companies: non space, SME, start ups
- It favours the participation of all the countries, not only the “space fairing ones”
- A broad variety of markets and of products can be therein developed

- Increase cross fertilization
- Further support new comers in approaching ESA
- More e

- Phase 2:
 - ✓ 40 M€ subscribed at CMin19+
 - ✓ The Call for Proposals EMITS/ AO8927
 - ✓ Additional thematic calls addressing new markets and disruptive applications
 - ✓ National workshops to push on cross fertilisation
 - ✓ Improve support and track product and companies follow on

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