

PRESTIGIOUS

euroPean stRatEgic cluSter parTnershlp to Go InternatiOnal for Uav Smes



Co-funded by the COSME programme
of the European Union

PRESTIGIOUS



PRESTIGIOUS

PRESTIGIOUS is an European project co-funded by the Cosme program of the European Union to

STRENGTHEN THE COMPETITIVENESS AND SUSTAINABILITY OF "DRONES" SMES IN EUROPE



In **2** markets

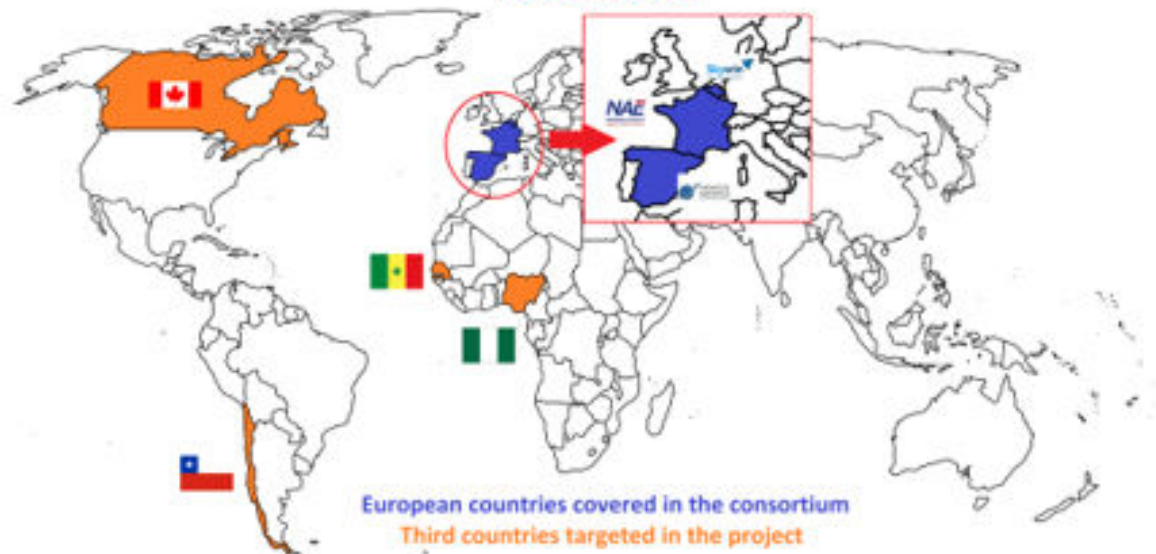


Inspection



Security

for **4** non-european countries



Canada / Chile / Nigeria / Senegal

with **3** partners



PRESTIGIOUS is an European project co-funded by the Cosme program of the European Union to

STRENGTHEN THE COMPETITIVENESS AND SUSTAINABILITY OF "DRONES" SMES IN EUROPE



4 MAIN ACTIONS :

Assessment of the value chain for drones in Europe

- *Identify the strengths of European SMEs*

Organization of 3 missions to non-European countries

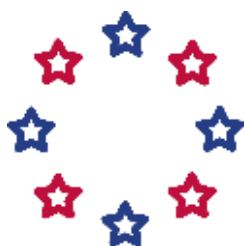
- *Identify potential end users outside Europe*
- **North America** (Canada)
- **Central Africa** (Nigeria, Senegal)
- **South America** (Chile)

Supply of individual support for European SMEs

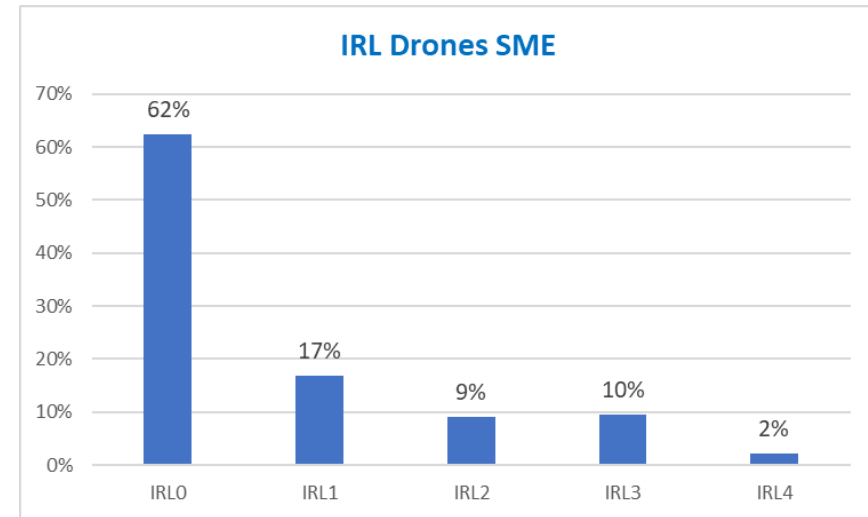
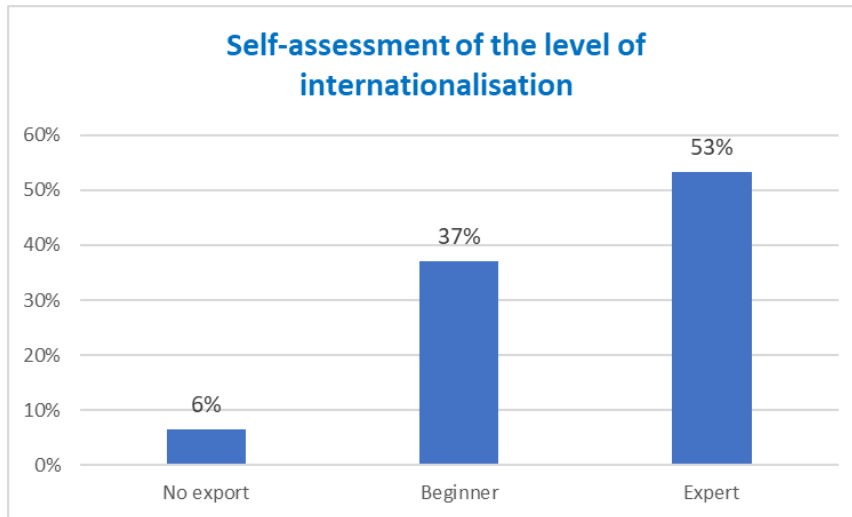
- *Organization of training seminars for the transfer of information*

Preparation of a joint internationalization strategy

- *Roadmap to establish an European strategy for drones*



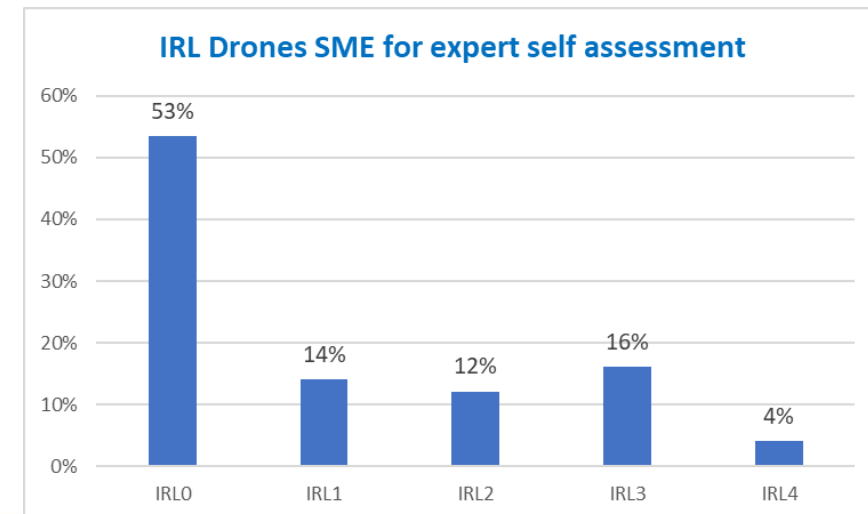
An analysis of the maturity of international development differing between the perception of industrialists (*self-assessment*) and their internal capacity (*International Readiness Level*).



For companies considering themselves as "experts" in international development, 53% are not sufficiently structured to develop internationally.

The risks identified are :

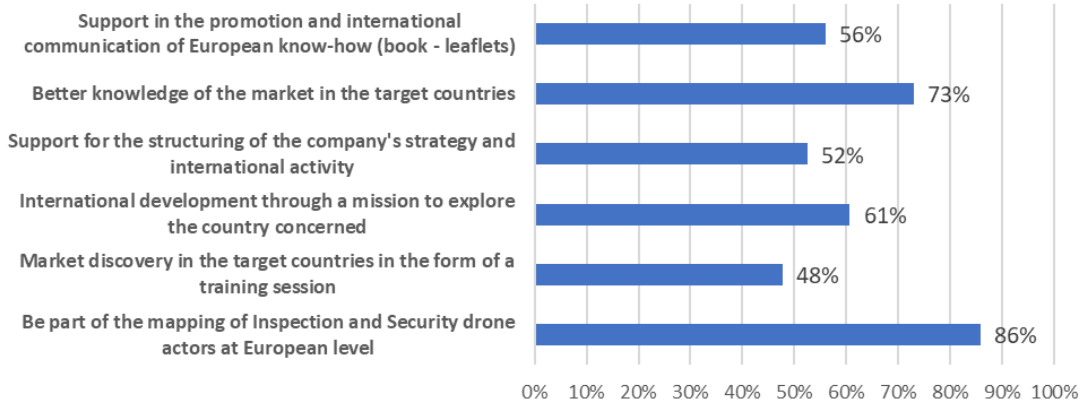
- consuming their cash flow,
- not succeeding in transforming opportunities due to lack of resources,
- putting themselves at risk in carrying out potential missions.



By analyzing in more detail, the differentiating elements between the International Readiness Level of companies, we can identify **the key factors for international development**

- have a dedicated **international budget** (*Trade Shows, Hotels, Travel, Booklets*),
- have dedicated **international staff**,
- have a **bilingual website**,
- level of **"English" language practice** in the company.

SME Expectation



Significant levers for internationalisation



Two expectations of SMEs emerge :

- A need for **communication and visibility** of SME activities,
- A better **knowledge of the market** potential of the targeted countries and the ability to **meet the actors** in question and especially thanks to **fair** (*not drone fair but market fair*).

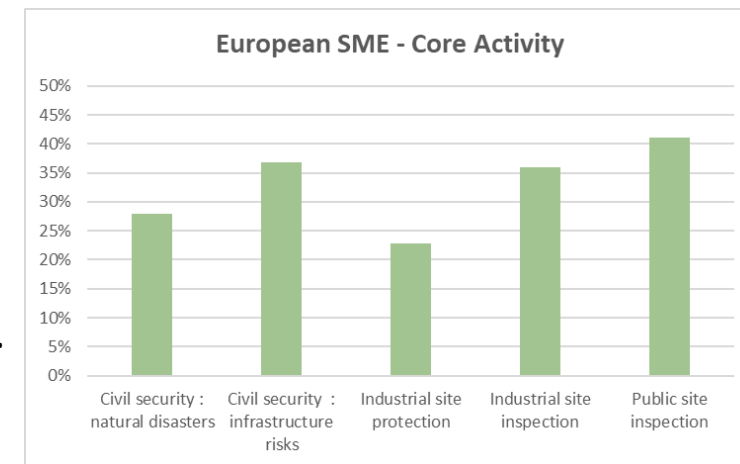


	Canada	Chile	Sénégal	Nigeria
Market				
- Long range Inspection (power- & pipe-lines)	X	X	X	X
- Inspection of towers (telecom)	X			
- Security (borders, infrastructures and agriculture)		X	X	X
- Agriculture, vegetation & environmental monitoring	X	X	X	X
- Mining	X	X		X
- Arctic and cold weather operations	X			
- Photogrammetry & mapping	X	X	X	



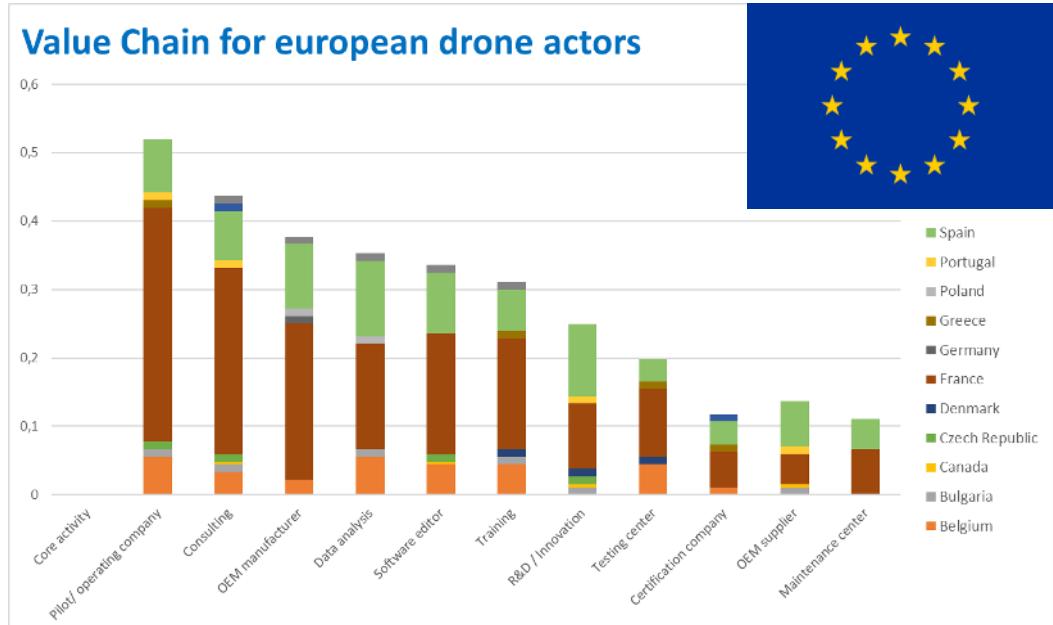
In conclusion, we can analyse these elements :

- The core business of European Drone actors **doesn't allow us to identify a particular sector** (*security, inspection*). One of the reasons is certainly the regulations and the market aren't yet mature and requires the actors to diversify and target all possible markets.
- The **expectations** identified from different countries **are also diverse**.
- So, it will be important to **target actors according to the needs identified in each country**. This will maximise the chances of development of drone SMEs in Europe.





	Canada	Chile	Sénégal	Nigeria
Training			X	X
Material (aircrafts, payloads)			X	X
Drone détection	X		X	
U-Space development	X		X	
Test center	X	X		
R&D	X			



These elements allow us to identify **two important facts** :

- The first is that the **needs of each country are different** and thus an **individual and customised approach is needed** to ensure the success of the development of drone actors in Europe.
- The second indicates that **all the needs identified can be met** by European drone operators. However, a **targeted approach will be necessary** in order to guarantee the optimal success of the collaborations.



✓ **Situation** : UAVs are an emerging market. It is led mainly by SMEs which are not structured well enough and lack the appropriate support to fully benefit from international opportunities.

✓ **Issues** :

Increase the "international" maturity of European drone actors to facilitate their international development

✓ **Objectives**

1. Increasing the maturity of drone companies to go international

✓ Action training and support tools: English - strategy - communication support

2. Communication and visibility of European drone actors

✓ Mapping of skills

✓ Dedicated websites and promotion on social networks

3. Organisation of targeted sectoral missions

✓ Partnership with key stakeholders in the target countries and sectors

✓ Presentation of the international market sector and associated market and technology monitoring

✓ Targeting and making of international meetings

✓ Presence at trade and non-drone fairs



✓ Recommendation for effective and relevant deployment

- ✓ Neutral organization
- ✓ Do not focus on aviation actors
- ✓ Have dedicated resources (do not underestimate the associated workload)
- ✓ Capitalise on existing dynamics

✓ Key steps to implement this roadmap

- ✓ Validation of the roadmap by the European Commission and the partners (*EACP...*)
- ✓ Identification of funding opportunities (*European projects : eurocluster...*)
- ✓ Validation of the organisation and sustainability of PRESTIGIOUS dynamic



PRESTIGIOUS



Co-funded by the COSME programme
of the European Union

- Mélanie DURTH - Andalusia Aerospace
mdurth@andaluciaaerospace.com
- Samuel CUTULLIC – NAE
samuel.cutullic@nae.fr
- Anthony Biévelez – Skywin Wallonie
anthony.bievelez@skywin.be

