

ECX

CROSS-MISSION GROUND & COMMUNICATIONS ENTERPRISE

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GSAW 2021



Unlocking the Non-Traditional Base

1 March 21

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Agenda

- **BLUF**
 - **Background**
 - **Innovation Catalysts**
 - **Starburst Approach to Assessing Future Technology Providers**
 - **Recommendations for the Future**
-



Bottom Line Up-Front (BLUF)

- **Non-traditional Industry has much to offer in accelerating Space Force innovation, integration, and modernization**
- **Starburst brings the science of intelligent Non-traditional Industry into ECX**
- **ECX emerging as leader across DoD Space Enterprise for tapping non-traditional solutions/capabilities**

ECX working in collaboration with Starburst is quickly bringing new technologies and capabilities into the Space Ground Enterprise



Industry leads the emergent tech race

★ Throughout COVID, the non-traditional vendor market remained strong:

- Developed products & services faster than legacy players
- Record VC investments

Study: As space industry offers more services, government missing out on opportunities

1,688 views | Oct 7, 2020, 08:00am EDT

How Covid Has Impacted Startups' Ability To Raise VC Money And Thrive: 9 Global Experts Weigh In

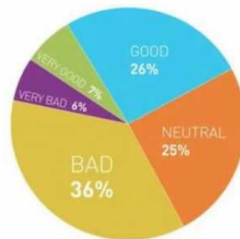
Michelle Greenwald Contributor

CMO Network

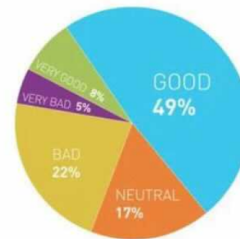
Cross-pollinator, world explorer, author, consultant, professor

August 2020 Startup CEO Survey In LATAM re: Impact of COVID 19

WHAT HAS BEEN THE IMPACT OF THE CRISIS ON EXISTING BUSINESS?
49 respondents out of 127 startups surveyed



WHAT HAS BEEN THE IMPACT OF THE CRISIS ON NEW BUSINESS?
45 respondents out of 127 startups surveyed



Startup CEO's in LATAM Feel COVID 19 Has Been Net Positive For New Opportunities
LATIN AMERICAN VENTURE CAPITAL ASSOCIATION

[~]



communications satellites
by private companies.
Ordering of SES's O3b
SES

WSJ PRO
INDUSTRY NEWS
Starburst Demo Day Gives
Into Startup Efforts in Space

Nearly \$1 Billion Was In Space Startups In 1 New Report Says



Alex Knapp Forbes Staff

I write about the future of science, technology, and culture

THE WALL
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BUSINESS

Aerospace Role at Par

The presence of the new
established players increa



By Andy Pasztor
June 18, 2017 11:11 a.m. ET

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Barriers to leveraging emergent tech

- ★ Too much “commercial noise”
- ★ Decisionmakers have an incomplete picture of the marketplace

3,145 views | Sep 19, 2019, 07:00am EDT

Inside Celebrity Tech Investor Trends



Lauren deLisa Coleman Former Contributor
Enterprise & Cloud



Actor Jared Leto speaks during the Wall Street Journal D.Luxe conference in Laguna Beach, ... [†] ©

NEWSLETTERS • TERM SHEET

Secretive Defense Tech Startup Anduril Reaches Unicorn Status: Term Sheet

Palmer Luckey's Anduril has raised new funding at a valuation of more than \$1 billion.

BY **POLINA MARINOVA**

September 12, 2019 9:53 AM EDT



Palmer Luckey, co-founder of Oculus VR Inc. and creator of the Oculus Rift.

BLOOMBERG — GETTY IMAGES



ECX is an USSF innovation catalyst



Air Force space modernization starts from the ground up

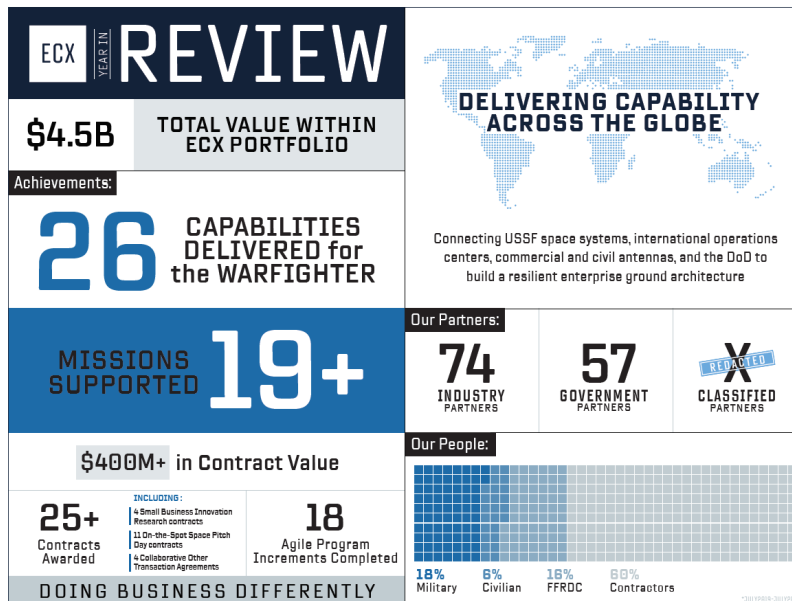
by Sandra Erwin — August 5, 2019



The 460th Communications Squadron and the 460th Civil Engineer Squadron work with Radome Services at Buckley Air Force Base, Colorado, to replace an existing antenna with a more technologically advanced antenna that can better communicate with newer satellites. Credit: U.S. Air Force

ANNUAL REPORT 2020 ECX SINCE INCEPTION

ECX has experienced a big year. Implementing agile principles, executing novel acquisition strategies, awarding critical contracts, and establishing collaborative partnerships have enabled ECX to deliver—new capabilities for the warfighter, direct support to missions across the DoD, and a more resilient worldwide ground architecture for the space enterprise.



In order to achieve “E.P.I.C. Speed,” it is critical that ECX unlock the non-traditional base



ECX & Starburst are leading commercial innovation for defense



- ★ **Specialized Starburst team** embedded with ECX teams
- ★ Acts as a **risk-reduction mechanism** for ECX teams and leadership engaging commercial market
- ★ **Increasing speed** by leveraging rapid funding vehicles



Validating the commercial “noise”

Targeted Market Intelligence

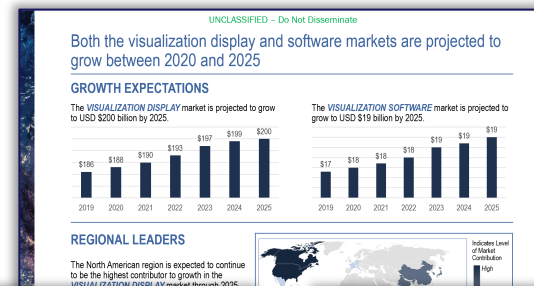
- The “unknown unknowns”
- What other non-trationals are doing in the market?

Emergent Technologies

- Benchmarking capabilities
- What technology boundaries are being pushed?

Cutting-Edge Industry Practices

- Quantum, DevSecOps, etc.
- How are allies driving innovation?

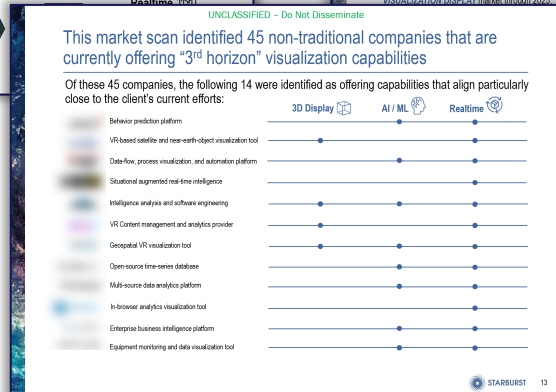


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ATO Management & Report Automation Software Tool Providers

Company	HQ location	Product Name	Product Description
Chantilly, VA			Web-based system designed to streamline and automate the ATO process with a simplified navigation for SMEs
Largo, MD			Small automation tools for Azure FedRAMP compliance and shortening FedRAMP ATO timelines for Azure Government Cloud
Madison, AL			Compliance, risk assessment, and management software solution for security automation. The tool checks for compliance against the NIST 800-53 Risk Management Framework and provides actionable feedback for management
Toronto, Canada			Software for managing ATOs in all three pathways – RMF Now, Fast Track ATO, and Continuous ATO (cATO)
La Jolla, CA			Web-based application that automates the NIST SP 800-37 RMF process, defines remediation workflows, and provides real-time insights
			Software suite that offers scanning, remediation, compliance reporting, and external interfaces to other tools for managing RMF, NIST 800-171, or production STIG compliance requirements
			Applications for automating the processes and reporting involved in multiple NIST security standards

Source: Starburst SME



★ Comprehensive research and SME-based market trend analyses are generated to map emergent capabilities offered by non-traditional industry players to ECX innovation & modernization efforts



Qualifying non-traditional players

★ Starburst assesses non-traditional against four key dimensions, mapped to a “desire to work with”

Offer / Innovation

- Uniqueness
- Patents

Market

- Sizing
- Accessibility

Team

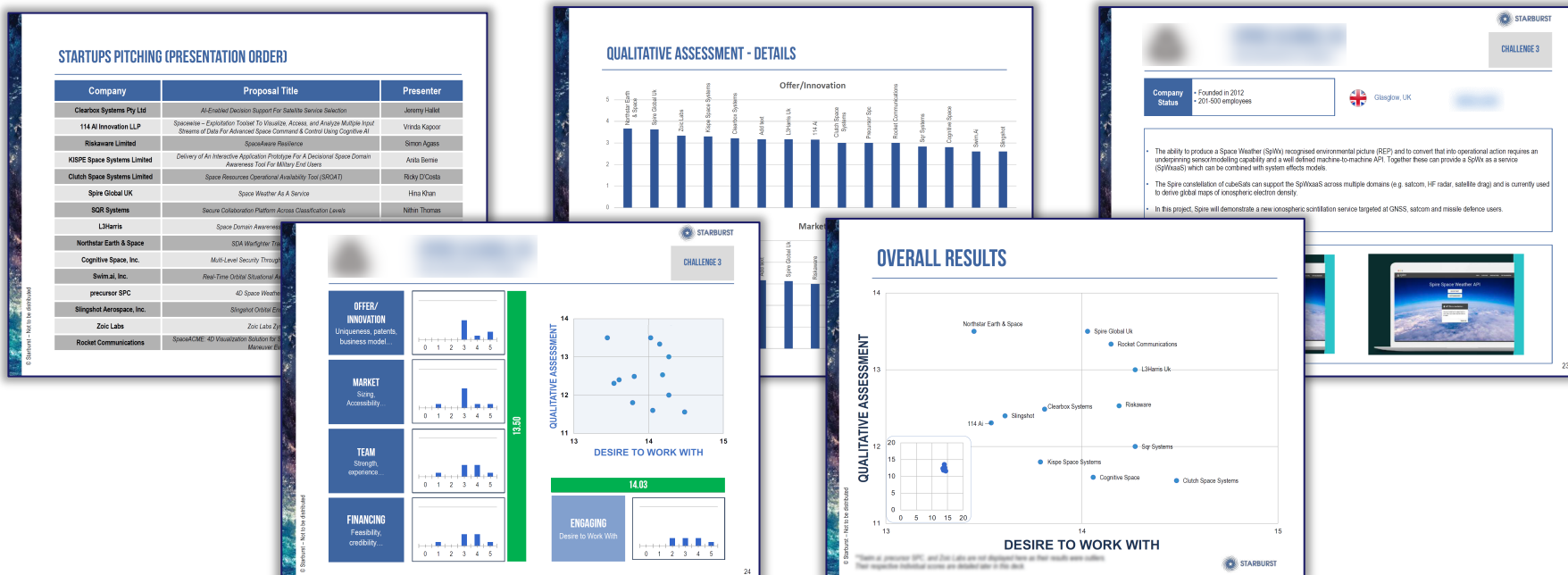
- Strength
- Experience

Financing

- Feasibility
- Credibility

Engaging

- “Desire to work with”

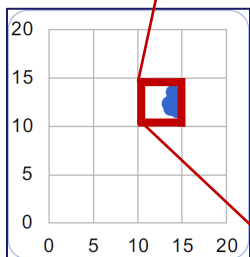
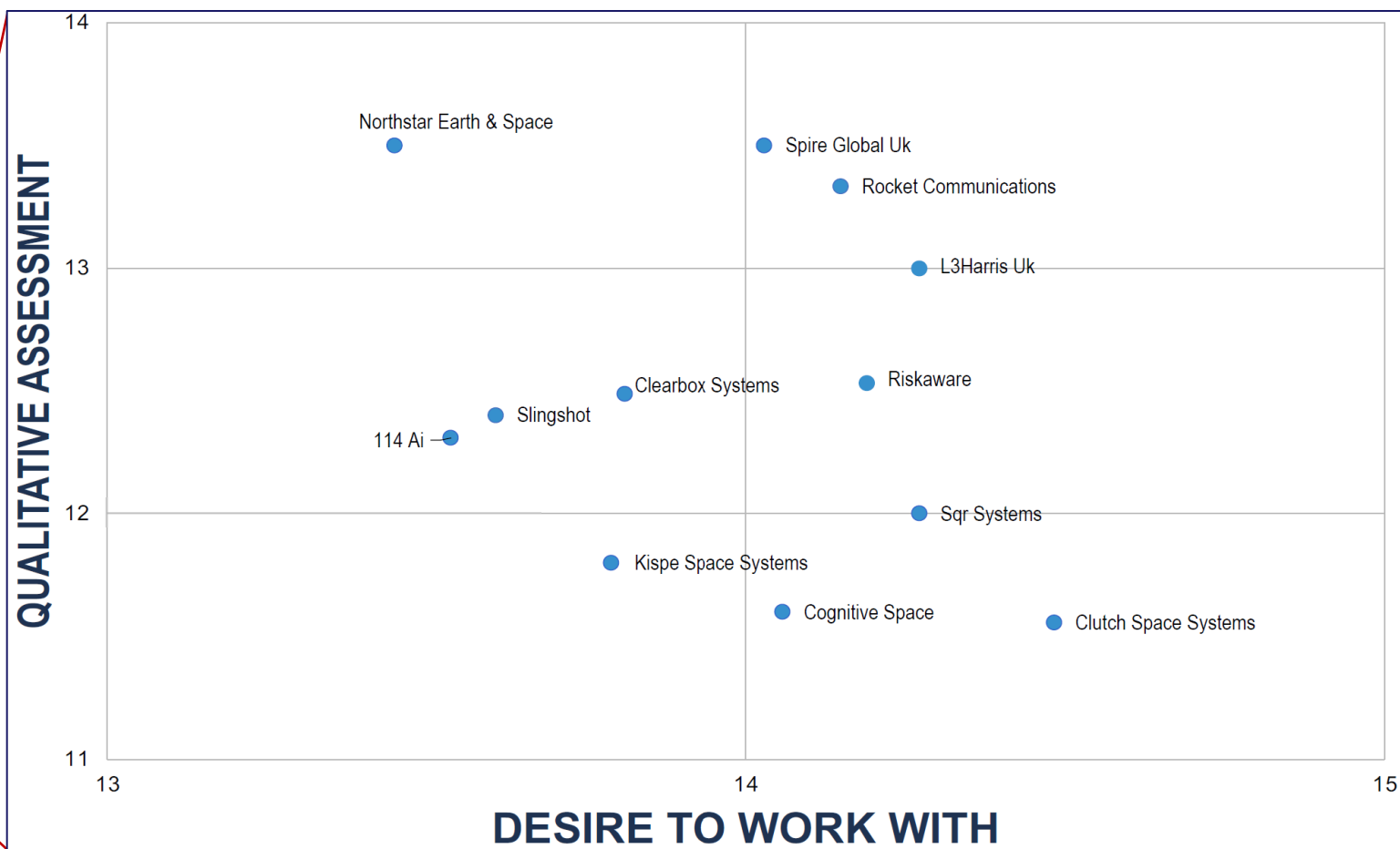


★ Commercial independence (i.e., not reliant on gov't contracts to succeed) is also an important factor



Starburst's method proven 93% accurate

★ Starburst's methodology consistently predicts which non-traditional industry players receive contract awards with **~93% accuracy**





Recommendations for the future

★ Continue to evolve and modernize!

Integrate emergent technologies early on



Bring the “startup” mentality into your entity



Industry will continue to drive affordable innovation



Foster partnerships with non-traditional industry players to maintain a strategic advantage



Challenge the status-quo mindset



Approach challenges similar to industry & embrace their best practices



★ Find a way to more accurately budget and proactively navigate the commercial noise



Next challenge: Preparedness and continuous integration

Pathway for non-traditional industry players to sustain long term integration and development. “Pitch day” type events were a great first-step. The next pieces are:

- ★ From “proof of concept” to operations:
 - How to get new capabilities through operational acceptance?
 - Who will develop and sustain capabilities for operations?
- ★ Acquisition and sustainment entities involved up front to provide strategic input
- ★ Consider best fit into technology architecture roadmaps





Contact Information

Thank You

For questions and/or additional information, please contact:

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