



MARKETING COMMITTEE MEETING Agenda

Thursday December 10, 2020
9:00 a.m. EDT

By Teleconference
Call-in Number: 866-528-2256
Guest Code: 4875556#

Agenda Items	Vote	
Call to Order		Sonya Deen
<ul style="list-style-type: none">Public CommentsMinutes September 22, 2020Updates to Inbound/Outbound Marketing ActivitiesAnnual Report 2020 Overview	✓	Howard Haug Emma Newsham Emma Newsham
Closing Remarks/Adjournment		Sonya Deen

Minutes September 22, 2020



Minutes of a Regular Meeting of the Space Florida Marketing Committee

A Regular meeting of the Space Florida Marketing Committee was held by Teleconference on September 22, 2020. The meeting was called to order at 9:00 a.m. ET.

COMMITTEE MEMBERS PRESENT:

Sonya Deen (Chair)
Jesse Biter

SPACE FLORIDA STAFF PRESENT:

Frank DiBello
Howard Haug
Denise Swanson
Emma Newsham
Elizabeth Loving

Howard Haug thanked committee members for attending. Sonya Deen stated that the meeting is being conducted in accordance with the Sunshine and Public Record laws of Florida. There were no public comments.

Sonya Deen stated that the first item was the approval of the prior meeting minutes.

Jesse Biter made a motion to approve the Marketing Committee Minutes from July 19, 2020, which was seconded by Sonya Deen, and approved unanimously.

Jesse Biter made a motion to approve the Marketing Committee Minutes from December 12, 2019, which was seconded by Sonya Deen, and approved unanimously.

Emma Newsham presented updates on the following items:

- Customer Satisfaction Survey
- Status of the Inbound/Outbound Marketing Activities
- New Initiatives Under Consideration
- Market Assessment for Board Strategic Planning Efforts

Frank DiBello commented on the status of the industry during this time of COVID-19. He stated Space Florida business activities have increased.

CLOSING REMARKS & ADJOURNMENT

Sonya Deen, Chairman of the Marketing Committee thanked the staff and committee members for their discussion and adjourned the meeting at 9:30 a.m. (ET)

Annual Report 2020 Overview

2020
ANNUAL REPORT

SPACE FLORIDA







ANNUAL REPORT 2020

TABLE OF CONTENTS

Letter From President & CEO	4
Letter To the Stakeholders	6
Message from Space Florida Chair of the Board	7
Performance Year 2020 Annual Outcomes	8
Space Florida's Statewide Reach	10
<i>Leonardo Aerospace</i>	12
<i>CAE USA, Inc.</i>	12
<i>Made In Space</i>	13
Cape Canaveral Spaceport	14
<i>Cape Canaveral Spaceport Infrastructure Improvements</i>	14
<i>Crewed Spaceflight Returns to Florida</i>	14
<i>NASA Ascent Abort-2 Mission</i>	15
<i>OneWeb Satellites Inauguration</i>	15
<i>SpaceX/NASA Crew Demo-2 Launch</i>	15
Government Relations	16
<i>Department of Commerce Advisory Committee</i>	16
<i>U.S. Space Command</i>	16
<i>USDOT Infra Grant</i>	17
Research, Innovation & Special Projects	18
<i>2019 Florida Aerospace Capital Forum</i>	18
<i>2020 Aerospace Innovation & Tech Forum</i>	19
<i>Florida-Israel Innovation Partnership</i>	20
<i>Space Florida in the Community</i>	21
Space Florida Leadership (<i>Space Florida Board Members and Executive Staff Photos</i>)	22
Looking Ahead	23

LETTER FROM PRESIDENT & CEO FRANK DIBELLO

SPACE FLORIDA



Dear Stakeholder:

As we enter a new decade, I am passionate about Florida's future as a major aerospace state and the global leader in ushering in a bold new space-based economy! Today, we witness historic and game-changing events with increasing frequency here in Florida, shaping the path of the aerospace industry well into the future.

A handwritten signature in dark ink that reads "Francis D. Dibello".

FRANK DIBELLO

*President & CEO,
Space Florida*

Just recently, the world watched as a crewed launch lifted off from Florida's Cape Canaveral Spaceport – with American astronauts flying on an American spacecraft to the International Space Station (ISS), and followed by their safe return. This clearly marked the beginning of a new era in America's crewed space activities and was a remarkable demonstration of the strength and innovation of the nation and Florida's commercial space industry. It was a moving event for the Cape to get back in the business of flying our astronauts, but it was particularly special for Pensacola. They too now are a part of Florida's role in human spaceflight.

26 U.S. LAUNCHES FROM FLORIDA

Florida is also playing the dominant role in the remarkable growth in U.S. launch cadence, supporting our nation's space security, exploration and the commercial space marketplace. As of June 30, 2020, the Cape

Canaveral Spaceport had conducted 26 launches, a further demonstration of the importance of the continued investments we are making in growing our space industry and modernizing our state's spaceport capabilities.

Like everywhere across the planet, this year has presented enormous new challenges. In 2020, the pandemic has impacted major sectors of aerospace, particularly on the aviation sector. This in turn has impacted the state's tourism and economic well-being. However, the space industry led aerospace industry growth areas with a nine percent growth in 2019 and has thus far continued its development rate well into this year. As we look past the pandemic, the space industry represents a key part of the state's strategy for post-pandemic economic recovery.

Prior to the arrival of COVID-19, much of Florida's historic economic success was based upon a burgeoning high-skilled, high-wage commercial space industry. Even through the darkest days of 2020 the Cape kept launching rockets. For national security, human and scientific exploration and for the private sector. The Cape was slowed but kept pushing through, safely. As we look to chart a course for economic recovery, where to invest could not be clearer.

Space Florida has also responded to the pandemic and industry disruptions and has been successfully engaging new aerospace opportunities caused by companies re-thinking how and where they are conducting their business. As they look to invest in newer facilities, modernize and increase productivity and lower operating costs, they are seeking Florida in growing numbers. Space and aerospace companies regularly note our friendly business operating environment, highly trained workforce, proven infrastructure, and great location as the main reason they move to or expand in Florida.

Space Florida is working with other state economic development partners to create an energized driving force in recruiting these companies to the Sunshine State.

We have good reason to be enthusiastic about our future in aerospace!

LETTER TO THE STAKEHOLDERS

NOVEMBER 13, 2020

Dear Stakeholder:

Florida's aerospace industry continues to thrive and the future of our commercial space industry has never looked so promising. In fact, 2020 was a year full of accomplishments and a bright chapter in Florida's long history of supporting our nation's efforts in space.

I'm proud of my administration's achievements to power Florida's space renaissance to new heights. In May, I was honored to witness the launch of SpaceX's Falcon 9 rocket carrying NASA Astronauts Doug Hurley and Bob Behnken aboard the Crew Dragon spacecraft, the first crewed mission since the retirement of the Shuttle in 2011. In July, I was fortunate to attend the launch of NASA's Perseverance Mars Rover, part of NASA's Mars Exploration Program that will return critical information about the potential for life on the Red Planet. Following the Perseverance's launch, I met with industry and community leaders and signed HB 717, which gives Space Florida additional flexibility to provide financing for commercial space and aerospace projects to further bolster our state's capabilities.

This year we also announced that Made In Space, Inc. was relocating its headquarters and satellite manufacturing operations from Silicon Valley to Jacksonville as part of a multi-year expansion program that will generate hundreds of jobs. We continue our collaboration with the industry's top private sector companies, including Boeing, Lockheed Martin, Firefly Aerospace, OneWeb Satellites, Blue Origin, and others. Space Florida also continues to foster our international partnerships with Israel and France to engage in mutually beneficial research and best practices to expand our space exploration abilities.

Our achievements in Florida's space industry continue to inspire millions across our state, nation and the world and are a reminder that no matter what challenges we face, by working together, we will persevere.

As we approach 2021, I look forward to our continued efforts with Space Florida and the private sector to ensure that Florida remains the world's premiere gateway to space.

Sincerely,



Ron DeSantis
Governor



RON DESANTIS

*Governor,
State of Florida*





MESSAGE FROM SPACE FLORIDA CHAIR OF THE BOARD

Dear Stakeholder:

This year, I once again had the distinct honor to serve as Chair of Space Florida's Board of Directors. I could not be more proud of the growth and progress I have seen in Florida's space industry in 2020.

In a year of distinct challenges for our state, the space industry has been a shining star in Florida's economy. While the COVID-19 pandemic has adversely impacted many industries in Florida, the growth and investment in our space economy is stronger than ever. This is a testament to the exemplary work of Space Florida and the business-friendly environment we foster in Florida.

No event exemplified the tremendous achievement in Florida's space industry more than the historic SpaceX Crew Dragon launch back in May. This mission served to highlight the benefits and strength of partnerships between federal, state, and private entities. It was truly a proud day for our country and for Florida.

Florida continues to be the top destination in the country for companies that plan to lead the next generation of the space industry. From welcoming OneWeb Satellites to Exploration Park at Cape Canaveral Spaceport to facilitating the relocation of Made in Space to their new headquarters in Jacksonville, Space Florida had an outstanding year in helping innovators and job-producers make Florida their new home.

I sincerely thank the Space Florida Board of Directors for your leadership. Your commitment to making our space industry the top in the nation is the driving force behind our success. I would also like to extend a very special thank you to Space Florida's CEO Frank DiBello and the staff of Space Florida, for the excellent work you do.

As we look toward the future, Governor DeSantis and I recognize that the opportunities for Florida in space are boundless. Space Florida is ready to make Florida the world's launch pad for aerospace research, investment, exploration, and commerce.

Sincerely,

Lieutenant Governor Jeanette Nuñez
Chair, Space Florida



**LIEUTENANT GOVERNOR
JEANETTE M. NUÑEZ,**

*Chair of the Board,
State of Florida*

PERFORMANCE YEAR 2020

ANNUAL OUTCOMES

In PY2020, Space Florida recruited, retained and expanded 15 space and aerospace-related companies and more than 4,518 jobs. Additionally, Space Florida implemented 15 State strategies, noted in the “Florida Strategic Plan for Economic Development,” in PY2020. The annual number of research projects, partnerships and grants supported by Space Florida in PY2020 was 32.

Funding appropriated by the State of Florida is vital to our efforts, providing us the leverage we need to enable new business development each year. Because of the State’s trained workforce, incentives and infrastructure, Florida continues to attract and expand aerospace and high-tech companies. Space Florida’s ongoing efforts maintain that *Florida is the Place for Space*.

We are pleased to share Space Florida’s top projects and outcomes for PY2020 in the following pages.



26

COMPLETED
LAUNCHES



12

COMPLETED LANDINGS

(2) Landing Zone-1
(10) Drone Ship Landings



15

SPACE & AEROSPACE-
RELATED COMPANIES

recruited, retained
& expanded



4,518

APPROXIMATE JOBS

recruited, retained
& expanded



15

STATE STRATEGIES

implemented



32

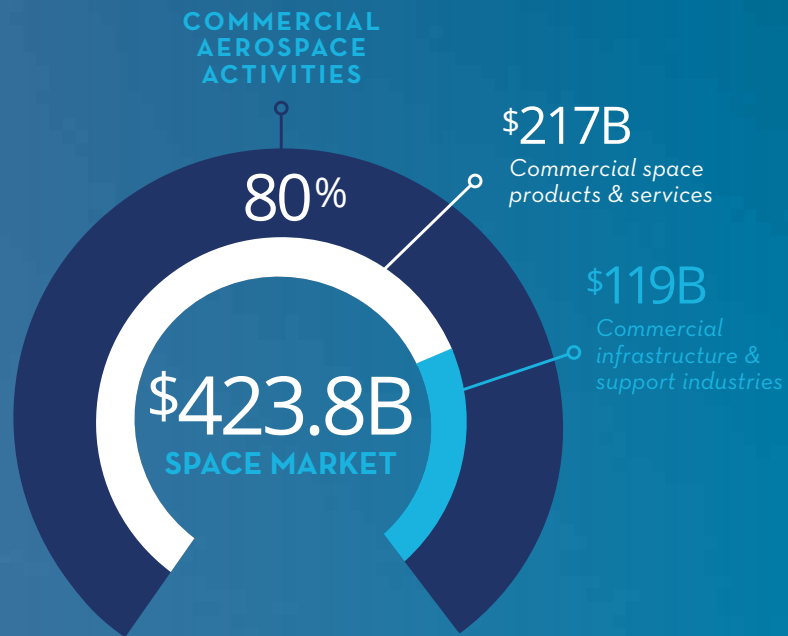
RESEARCH PROJECTS,
PARTNERSHIPS & GRANTS

supported



THE SPACE FOUNDATION'S SPACE REPORT 2020 Q3:

The Authoritative Guide to Global Space Activity Executive Summary revealed that in 2020, 80% of the global \$423.8 billion space market came from commercial aerospace activities. That number includes both commercial infrastructure and support industries (\$217.72 billion) and commercial space products and services (\$119.17 Billion). Additionally, the global space economy grew 6.3% during the year 2018.



NASA/Joel Kowsky

STATEWIDE REACH

In a year of an unprecedented pandemic, Space Florida's strong focus on its statute and good business fundamentals led to sustained organizational productivity. From a business development perspective, this focus on fundamentals included enhanced outreach to organizational stakeholders, industry and economic development partners. The economic development outreach centered on working with regional and local economic development groups that are leading local efforts to attract and expand aerospace related companies to strengthen the aerospace and defense sectors in the state. The result of these efforts is a better understanding by the partners of the efficacy and flexibility of Space Florida's toolkit as a mechanism to enhance the value proposition to the aerospace and defense companies selecting a Florida-based location.

On a comparative basis, Space Florida's deal log – a measurement of the projects Space Florida is actively working to drive to a close within a reasonable timeframe – measurably increased over last year. In fact, Space Florida's toolkit is uniquely positioned to assist the state and its space, aerospace and defense clusters in their efforts to be positioned for recovery and growth post pandemic. Specifically, Space Florida is seeing deal opportunities as:

- Companies across the industry clusters we track look to reduce operating costs through facility consolidation and modernization;
- Well-positioned maintenance, repair and overhaul (MRO) companies look to capitalize on market share and expansion opportunities; and
- U.S. companies as a whole move to recapture critical supply chains from abroad to the domestic shores.

In part, Space Florida is seeing the increase in its deal activity because of a well-earned reputation of being able to structure and execute on complex business and economic development deals throughout the state. Perhaps, a more impactful reason for the increase is due to the organization's sales and marketing efforts and a growing awareness in the marketplace of efficacy and flexibility of Florida's Space Florida's toolkit.

Examples of the growing awareness in the marketplace are evident across Florida's economic development communities beyond Florida's space coast. Economic development partners like the Beacon Council in Florida's Southeast region to the Hardee County Industrial Development Authority in Florida's Heartland region to the Bay Economic Development Agency and the Okaloosa County Economic Development Office in the Great Northwest region are all working with Space Florida to close significant economic development projects within their communities.

This year, Space Florida's toolkit was invaluable in helping Okaloosa County secure a big win for their community. Space Florida's toolkit was leveraged by Santa Rosa County to secure a location commitment by Leonardo Aerospace in the successful competition for a US Navy rotary aircraft contract. Space Florida will utilize its conduit financing tool to construct and own a new facility at Whiting Field Aviation Park, to be leased to the company for its support center for delivery, maintenance and training for the new aircraft. The outreach of Space Florida allowed Santa Rosa County Economic Development the ability to include Space Florida in the negotiations with the company, ultimately providing a value proposition in which the company used to make a location decision.



“The State of Florida is extremely fortunate to have such a progressive and dynamic economic development entity/agency!”

—BILL LAMBERT, DIRECTOR OF THE HARDEE COUNTY ECONOMIC DEVELOPMENT OFFICE

And other local partners are seeing the value proposition Space Florida brings.

The market awareness of Space Florida's toolkit has also moved beyond the industry and the traditional state and local economic development partners. Educational institutions are also seeking to foster collaborations with Space Florida in unique and innovative ways to address another critical challenge facing Florida's aerospace industry – workforce availability and skill alignment; expanding research and innovative technology development to support industry commercialization; enabling in-state rapid technology to market pathways for established and startup enterprises, and engaging the next generation of explorers. This fiscal year, Florida Agricultural & Mechanical University's (FAMU) – Florida's preeminent public historical black university – sought Space Florida's support on several funding proposals to NASA.

Space Florida and FAMU are both empowered through the Laws of Florida to undertake a range of activities on a statewide basis. Space Florida's programs emphasize the expansion of the state's aviation and aerospace industry sector by providing services including but not limited to financing and the development of

infrastructure. FAMU is a premier land-grant, doctoral-research university that produces globally competitive graduates that is dedicated to the advancement of knowledge, resolution of complex issues, and the empowerment of citizens and communities.

Under two proposals funded by NASA, FAMU and Space Florida intend to collaborate to develop new programs, resources, facilities, and networks to support increased space research and technology development by universities and companies, technology commercialization and startup support initiatives, innovative workforce programs and industry partnerships, and strengthening STEM education and engagement. In developing and implementing these activities, Space Florida and FAMU will utilize approaches that leverage and combine existing partnerships and resources and provide opportunities for additional academic and industry partners to contribute and benefit, and work towards maximizing statewide impact.

As our nation and state looks to rebound in calendar year 2021, it's expected that Space Florida and its toolkit will play a major role in assisting in our state and its aerospace and defense industries in an economic recovery.

STATEWIDE REACH

LEONARDO AEROSPACE (SANTA ROSA COUNTY)

In January, Leonardo Aerospace announced it would build a new customer support center adjacent to Naval Air Station Whiting Field in Santa Rosa County. This project is a result of Leonardo being awarded the contract to replace the Navy's Advanced Helicopter Training System TH-73. Leonardo will build a comprehensive customer support center adjacent to Naval Air Station Whiting Field in Santa Rosa County. The project is a result of the company being awarded the contract to replace United States Navy's Advanced Helicopter Training System TH-73. Leonardo's American-made TH-119 IFR single engine helicopter to replace 130 of the Navy's aging fleet.

The project is an outcome of Space Florida utilizing its statewide toolkit. Leonardo will construct an approximately 100,000 square-foot facility in Whiting Aviation Park, a 269-acre planned development adjacent to Naval Air Station Whiting Field, where all

100,000
SQ. FT. FACILITY

helicopter pilots for the Navy, Marine Corps and Coast Guard are trained. The facility will house full

service including spare parts, warranty processing and renewal, technical and product engineering and component and airframe repair. Through a limited-access use agreement between Santa Rosa County and the US Navy, tenants of Whiting Aviation Park will be able to use the Navy's airfield facilities.

“Utilizing Space Florida's toolkit, Leonardo will contribute to an already thriving aerospace and aviation industry in Northwest Florida while also serving the needs of our nation's military.”

—FRANK DIBELLO, SPACE FLORIDA PRESIDENT AND CEO

CAE USA, INC. (TAMPA/HILLSBOROUGH COUNTY)

In a groundbreaking ceremony at the Tampa International Airport in November 2019, Space Florida joined the Hillsborough County Aviation Authority and the Tampa Hillsborough Economic Development Commission in welcoming the new CAE USA, Inc., headquarters to Florida.

102,000
SQ. FT. FACILITY

CAE USA, Inc., provides world-class training and simulation for the U.S. Department of Defense

and allied defense forces. The new campus will support the aerospace training hardware with a 102,000 square-foot facility and host a 133,000 square-foot building to serve as the home office with 500 retained employees and 150 new employees, with an average annual salary of \$80,000.

The project is a public-private development partnership between the company, the Hillsborough County Aviation Authority, local economic development partners and Space Florida, in which Space Florida is developing a campus for the company directly on Tampa International Airport.

Space Florida lease structures provide a multitude of benefits to companies like CAE USA to include below-market lease rates. Also, given the nature of synthetic leases, it is anticipated that much of the overall lease cost to CAE will be eligible for reimbursement.

The company has retained EDGE Architecture, Inc., for design services and to deliver a complete set of construction documents to Space Florida. Space Florida will then competitively procure construction management services to deliver the project. In a traditional developer role, Space Florida is also securing third-party conduit financing, the proceeds of which will be utilized by Space Florida to construct the facilities. Construction is anticipated to be completed in the first quarter of 2022. Once complete, Space Florida will lease these built-to-suit facilities to the company under long-term lease agreements. Afterward, the assets will then revert to Tampa International Airport for their use or redeployment.

MADE IN SPACE (JACKSONVILLE)

In January, Governor Ron DeSantis announced that Made In Space, Inc. would be relocating its headquarters and satellite manufacturing operations to a new headquarters facility in Jacksonville. The new headquarters will include the capability to locally manufacture, test and control spacecraft and in-space manufacturing equipment. The headquarters relocation is part of a multi-year expansion program that has generated over 50 new positions in Jacksonville since January 2019.



“As a global leader for in-space manufacturing and assembly, Made In Space has a proven track record of delivering innovative space technology demonstrations at an industry-leading pace,” said Governor DeSantis. “Made In Space’s move to Florida is more evidence of Florida’s success and growth in the aerospace industry. My administration remains committed to supporting that growth and ensuring we maintain an economic climate that allows companies like Made In Space to prosper.” “Made In Space’s move to Florida is more evidence of Florida’s success and growth in the aerospace

“This is an exciting moment and relocating our headquarters to Jacksonville is a strategic step to position the company for long-term growth,” said MIS President and CEO Andrew Rush. “By expanding our presence in Florida we can leverage a skilled aerospace workforce, large scale infrastructure to support our growth, and key strategic partners like Space Florida that will accelerate our momentum as we continue to develop world-class space technology.”

—ANDREW RUSH, MIS PRESIDENT AND CEO

industry. My administration remains committed to supporting that growth and ensuring we maintain an economic climate that allows companies like Made In Space to prosper,” said Governor DeSantis.

The announcement is the product of years of behind-the-scenes work. Made In Space and Space Florida formed a unique partnership, which evolved into including a first-of-its-kind financing structure as Space Florida utilized space-bound hardware as security.

The Jacksonville headquarters will consolidate the administrative, engineering, operations, and

20,000
SQ. FT. CAMPUS

production teams for the company’s major technology programs, including Archinaut One. MIS has also

expanded its operational footprint to accommodate growth in Jacksonville with the new headquarters campus spanning nearly 20,000 square-feet.

MIS was founded in 2010 in Moffett Field, CA and expanded to Jacksonville in 2015. The headquarters relocation will bring additional high-paying aerospace jobs to the Jacksonville area as the company scales its operations to support the development of new technology and satellite missions.

MIS will maintain a presence in Silicon Valley to support additional technology programs and strategic relationships with industry partners.

CAPE CANAVERAL SPACEPORT

CAPE CANAVERAL SPACEPORT INFRASTRUCTURE IMPROVEMENTS

In support of launch providers at the Cape Canaveral Spaceport, Space Florida is constructing roadway improvements to link Space Florida's Exploration Park to most launch complexes, allowing intermodal transportation of oversized launch vehicle stages, payloads and flight hardware. Such roadway upgrades include removing obstructions such as signals, lights and signs and improving roads for turning movements. More specifically, these improvements will enable Blue Origin to transport their flight hardware, including the first stage, which will be longer than a football field, wider than the average road and as tall as a four-story building. Blue Origin has a slogan of "building a road to space," and through this co-funded project between Space Florida (FDOT Economic Development Transportation Project Fund Grant) and Blue Origin, Space Florida is helping clear the way to build that "road."

Blue Origin's flight hardware and launch vehicles will travel 23 miles from the 1.2 million square-foot, 230-acre manufacturing campus and launch control at Exploration Park to Space Launch Complex (SLC) 36 at the Cape Canaveral Spaceport. SLC-36 is home to Blue Origin's New Glenn rocket's payload integration and first-stage refurbishment centers, which includes an integration hangar, launch access and lightening protection towers and one of the tallest water towers in the world at more than 350 feet.

In addition to the roadway improvements from Exploration Park to SLC-36, Space Florida is also enabling infrastructure upgrades for transportation of recovered launch vehicles from Port Canaveral to SLC-36, approximately nine miles. The New Glenn rocket will feature a reusable first stage built for 25 missions. These infrastructure improvements are necessary for the transport of launch vehicle stages, payloads and flight hardware along planned routes within the Cape Canaveral Spaceport and various areas at Port Canaveral.

Blue Origin Florida By-the-Numbers:



CREWED SPACEFLIGHT RETURNS TO FLORIDA

In May 2020, America watched as SpaceX and NASA successfully launched Crew Dragon Demo-2, which restored the Cape Canaveral Spaceport to its rightful place as the launch point for U.S. Human Space Exploration – signaling a new era in human spaceflight. The launch from the storied Launch Complex 39-A marked a tremendous milestone in the commercial space industry realizing the dream where the government finally becomes a customer of the private sector in space transportation. Florida is proud to be part of such an historic mission, one that's been nearly a decade in the making, as all eyes were on Astronauts Bob Behnken and Doug Hurley's return to space. Space Florida looks forward to this new chapter in the State's long aerospace legacy, the return of crewed launches from the Cape Canaveral Spaceport and the excitement and inspiration of each launch.

NASA ASCENT ABORT-2 MISSION

In July 2019, Space Florida's Space Launch Complex (SLC) 46 hosted NASA's Ascent Abort-2 mission carrying the Orion Launch Abort System. It was a historic morning for the State of Florida, as this marked Florida's participation and investment in this nation's Return to the Moon. SLC-46, initially used by the Navy for Trident missile testing, is a joint-use facility between Space Florida and the US Navy. For this launch, the State partnered with NASA to invest nearly \$4.5 million dollars into a Lightning Protection System.

Ahead of the AA-2 launch, Space Florida completed a very-involved refurbishment of SLC-46 in preparation to support NASA's launch. These improvements included overhaul of launch pad mechanical and structural systems, renovation of pad electrical and communications systems, and the design and installation of a brand-new Lightning Protection System (LPS) over the pad. As well as supporting the AA-2 launch campaign, this new LPS will also provide increased protection for future SLC-46 customers by providing launch vehicle shielding from lightning events.



ONEWEB SATELLITES INAUGURATION

In July 2019, OneWeb Satellites, a joint venture of OneWeb and Airbus, officially opened the world's first high-volume, high-speed advanced satellite production facility at the Cape Canaveral Spaceport.

Historically, satellites take more than a year to build, costing millions of dollars. The OneWeb Satellites manufacturing facility at the Cape Canaveral Spaceport supports OneWeb's growing constellation of satellites, which will enable high-speed internet access and provide global connectivity. The factory, located in Exploration Park, is capable of producing up to 15 satellites per week and drastically lowering the cost in large volumes.

GOVERNMENT RELATIONS

FRANK DIBELLO SELECTED TO DEPARTMENT OF COMMERCE ADVISORY COMMITTEE

In August 2019, Space Florida announced the appointment of Frank DiBello, President and CEO, to the United States Department of Commerce Investment Advisory Council. The 25-member Council provides advice and counsel to Secretary of Commerce Wilbur Ross on how government policies and programs affects the nation's ability to attract and facilitate business investment from U.S. and international firms, with focus on advancing the United States as the best place to for business to operate, grow, succeed and create value.

Joining DiBello are senior executives from a host of forward-thinking industries in Energy, IT, Advanced Manufacturing and Consumer Products, each representing sophisticated and innovative enterprises well suited to helping the Department understand the potential and opportunities for improving US economic well-being through trade and investment.

Space has been identified by the Administration and the Commerce Secretary as a technology and market priority for this country, and the Department of Commerce in particular, will play a key role in evolving a world leading Commercial Space Industry for the U.S. Also joining DiBello on the IAC to advocate for the interests of Commercial Space will be Dan Hart, President and CEO of Virgin Orbit.

\$423.8B
GLOBAL SPACE MARKET

As the \$414 billion global space market continues to expand, with some projections showing the international

space economy will reach into the trillions of dollars by 2040, the State of Florida is poised to support continued U.S. leadership in space.

U.S. SPACE COMMAND

In August of 2019, U.S. Space Command (USSPACECOM) was established as the military's 11th unified combatant command and the U.S. Air Force was tasked with establishing a site selection process for its headquarters. Shortly thereafter, the Air Force announced that it had narrowed the list of possible headquarters sites to six potential locations. After considerable pushback from state and federal elected officials, including from Florida, the U.S. Air Force announced in March 2020 that it would begin a new fair and transparent site selection process for the headquarters of USSPACECOM. It is temporarily headquartered at Peterson Air Force Base in Colorado Springs. As part of the new site selection process, interested communities self-nominated potential sites for approval by each state's governor. In partnership with Enterprise Florida and the Florida Defense Alliance, Space Florida held a series of informational webinars for interested communities in the Sunshine State to learn about the application process.





In June 2020, Florida Governor DeSantis endorsed and submitted eight letters of nomination from Florida communities to the US Air Force as locations to host the headquarters of US Space Command. The locations are:

- City of Jacksonville
- City of Pensacola
- Hillsborough County – Tampa
- Miami-Dade County
- Orange County
- Seminole County
- Palm Bay-Melbourne-Titusville
- Pinellas County

Orange and Seminole counties later combined their applications into an Orlando Region bid. All communities made it to the evaluation phase, and in August, they submitted additional questionnaires that the Air Force will use to assess each nominating community's ability to host, employ, and sustain the headquarters of USSPACECOM. The evaluation phase will score the communities on four primary categories outlined in the nomination letter: Mission, Capacity, Community Support and Costs to the Department of Defense. Final candidate locations will be announced in November 2020.

USDOT INFRA GRANT

Space Florida is moving forward on a \$90 million infrastructure improvement grant recently awarded by the U.S. Department of Transportation (DOT). The grant will support three interrelated projects, including replacing the aging SR 405 bridge over the Indian River Lagoon, widening Space Commerce Way, and revitalizing a 3.7-mile stretch of NASA Parkway West. The project is expected to take approximately five years to complete.

With the award in place, Space Florida and its partners from the Florida Department of Transportation (FDOT) and NASA's Kennedy Space Center can now move forward with the project. The grant, which is part of DOT's Infrastructure for Rebuilding America (INFRA) program, will support growing aerospace industry and launch activities at the Cape Canaveral Spaceport. The current bridge will be replaced with two new high-span bridges, and the widening of the roadways will facilitate launch traffic, simplify transport of oversized launch hardware, and improve access for visitors.

"I applaud our partners at USDOT for recognizing the importance of this grant for Florida's Space Coast," said Governor Ron DeSantis.

“As our population continues to increase, modernizing the Cape Canaveral Spaceport is critical to the long-term viability of future launches, our transportation infrastructure and state economy. With this federal investment, Florida will remain a global leader in the aerospace industry for years to come.”

—RON DESANTIS, GOVERNOR OF FLORIDA

RESEARCH, INNOVATION & SPECIAL PROJECTS

2019 FLORIDA AEROSPACE CAPITAL FORUM

Space Florida and the Florida Venture Forum are pleased to announce Everix, Inc., Synmatter LLC and Censys Technologies Corp., as the top three winners, respectively, of the 2019 Florida Aerospace Capital Forum. Held at the Guidewell Innovation Center in Lake Nona, the event featured 16 presenting companies, four showcase companies and an opportunity to engage with the Florida Venture Forum investment community and aerospace industry leaders.

A panel of judges reviewed each selected company's presentation and supporting materials. Everix, Inc., was named the top company and received \$50,000 of Space Florida's \$100,000 Accelerating Innovation Award. Synmatter LLC and Censys Technologies Corp., were awarded the \$30,000 and \$20,000 cash prizes, respectively.

- **Everix**, Orlando is disrupting the optical filter market with their high-value and low-cost-to-produce solution. Their process creates high-performance filters that are 5x to 20x thinner and lighter than vacuum coated filters which enables their customers to miniaturize their devices. Everix filters are flexible, so for the first time, they allow for the application of high-performance filters on curved surfaces (LiDAR domes, auto-glass, AR/VR headsets, specialty eyewear, smart patches, etc.)
- **SynMatter**, Merritt Island provides smart anticorrosion microparticles utilizing its patented platform technology. These Smart Particles have a triggered release mechanism and only release the corrosion inhibitors at the site of corrosion damage. In standardized corrosion testing, the Smart Particles demonstrated increased anticorrosive performance. They exhibited significant reductions in corrosion product, scribe creepage and blistering. They showed no signs of coating delamination in both salt spray and atmospheric exposure testing on steel and aluminum alloys, when compared to both coatings with no inhibitors and coatings with pure inhibitors.

- **Censys Technologies**, Daytona Beach is a Florida-based C-corporation that sells long-range commercial drones, documentation services, mobile operation centers & data processing solutions that help drone service providers and enterprises minimize overhead & headache. Their recurring revenue streams include maintenance services, recurrent training, and data processing.

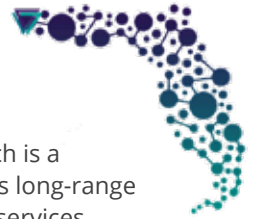
"The Sunshine State has quite an extraordinary aerospace history," said Lieutenant Governor Jeanette Nuñez. "With the goal of making our state the leader in the global space industry, Space Florida is committed to attracting investment, research and high-tech industrial commerce. We look forward to seeing Florida aerospace companies, entrepreneurs and investors at the 2nd Annual Florida Aerospace Capital Forum to ensure our state stays at the forefront of space innovation."

This event was an opportunity to broaden the spectrum of early stage, Florida-based aerospace and aviation companies and entrepreneurs, (as well as non-Florida entities with commitments to relocate), while engaging the industry with private equity, venture capital and angel investors.

To date, Space Florida-supported capital accelerators, have attracted more than \$460 million in funding and investments for the participating companies.

“Space Florida continues to rocket businesses like Censys Technologies to new heights! We took 2nd Place in the 2019 Aerospace Capital Conference and went on to win a Florida-Israel Partnership grant in 2020; those two events have helped us flourish among the vibrant Florida aerospace economy.”

—TREVOR PERROTT, CEO OF CENSYS TECHNOLOGIES



2020 AEROSPACE INNOVATION & TECH FORUM



In May, Space Florida and the Florida Venture Forum hosted the first-ever, all-virtual 2020 Aerospace Innovation & Tech Forum. Aerospace and innovative tech companies from related industries were invited to

apply to present in a first-ever web-based competition for the Space Florida Accelerating Innovation (AI) Award, totaling \$100,000. Twenty presenters were selected from a pool of more than 100 applicants by a committee of active venture investors.

A panel of judges reviewed each selected company's presentation and supporting materials. Archangel Lightworks was named the top company and received \$40,000 of Space Florida's \$100,000 Accelerating Innovation Award. Agriculture Intelligence, Inc., and Vital Vio were each awarded \$20,000. Additionally, all presenting companies received \$1,000.

- **Archangel Lightworks, Harwell Research Center,** United Kingdom is an optical communications company that builds products and services employing laser (optical) communications for the aerospace sector. These products and services include space terminals that can be mounted on satellites, air terminals that are mounted on drones or manned aircraft and ground communications terminals. Using their proprietary laser technology, Archangel integrate air, space and ground assets into hybrid architectures, accelerating the development of major aerospace market segments. Archangel already has a revenue stream, with advanced plans to enter the US market, headquartered in Florida.
- **Agriculture Intelligence, Inc.,** Gainesville, Florida is dedicated to making agriculture smarter. From citrus to corn, from lumber to livestock, from field to water management—they are bringing artificial intelligence, deep learning, and expert systems combined with UAV-collected aerial imagery to help reduce cost, eliminate waste, increase yields, and improve sustainability. Their flagship product is a powerful AI-based software engine called Agroview that changes how growers view their fields.



- **Vital Vio,** New York has an antimicrobial light that illuminates and protects surfaces and meets international standards for continuous and unrestricted use around people. Their planet-friendly antimicrobial LED lights combat the growth of bacteria, fungi, yeast, mold and mildew at home and in public places, and has enormous potential for both the aerospace and aviation industries. Unlike harmful chemicals and dangerous ultraviolet light, which clean intermittently, Vital Vio antimicrobial lights are at work 24/7, delivering continuous protection and creating an inhospitable environment for microbes. Recently, Vital Vio announced that they had received a contract with Delta Airlines to provide their antimicrobial services on all Delta aircraft.

This webinar series provided a chance for early stage, Florida-based companies in the fields of aerospace and related technologies, as well as non-Florida entities with commitments to relocate to Florida, and/or other demonstrable engagement in the Florida aerospace and innovation supply chain. Specifically, the opportunity is to broaden access to funding sources. The Aerospace Innovation & Tech Forum allowed presenting companies to engage with the Florida Venture Forum investment community, which includes private equity, venture capital and angel investors.

RESEARCH, INNOVATION & SPECIAL PROJECTS

FLORIDA-ISRAEL INNOVATION PARTNERSHIP: SEVENTH CALL FOR PROJECTS

Space Florida and the Israel Innovation Authority, an independent, publicly-funded agency created to address the needs of the local and international innovation ecosystems announced the seventh-round winners of industrial research and development funding tied to the Space Florida-Israel Innovation Partnership Program.

\$2M
RECURRING JOINT FUND

In October 2013, Florida and Israel established a \$2 million recurring joint fund to support research, development, and commercialization of aerospace and technology projects that benefit both Israel and Florida. For this Call for Projects, 15 joint proposals were submitted by teams of for-profit companies in Florida and Israel. Four teams have been selected for this seventh round of awards.

“Florida is at the epicenter of the commercial space industry and today's announcement of funding for the seventh-round winners highlights the bright future of the Space Florida-Israel Innovation Partnership Program.”

—RON DESANTIS, GOVERNOR OF FLORIDA

“This funding will not only be instrumental in the growth of Florida's space industry, but also for Florida-Israel relations. I look forward to seeing the great results these companies will achieve,” said Governor Ron DeSantis.



The winners are as follows:

- **Everix Optical Filters**, Orlando, Florida & SunCold (Israel) for the merging of SolCold's active cooling layer with Everix's optical fiber to use and manipulate solar energy. This upscale photonic crystal production will maximize the efficiency of solar power uses for cooling.
- **SynMatter**, Exploration Park, Florida & Green ICPS (Israel) for the joint development of one-layer corrosion protection coating systems with built-in surface treatment for innovative applications in the military, aerospace and aviation industries.
- **Made In Space**, Jacksonville, Florida & StemRad (Israel) for the development of in-space recycling plastic waste materials aboard the International Space Station into personal radiation protective equipment using unique additive manufacturing techniques in space.
- **Censys Technologies Corporation**, Daytona Beach, Florida & MobiliComm (Israel) for the construction of advanced technologies that will enable a highly integrated dual-redundant simultaneous communications system, to provide increased reliability and quality of service (QoS) for command and control (C2), Telemetry, and situational awareness.



SPACE FLORIDA IN THE COMMUNITY

As part of its mission to grow the aerospace ecosystem in the State of Florida, Space Florida is also committed to growing and supporting the communities in which its employees and the industry live. Space Florida is a proud supporter of United Way, hosting a workplace campaign each year. In 2019, with 100% participation, Space Florida employees stepped up to donate more than \$30,000 to United Way and its partner agencies.

“Space Florida knows that a strong local community is important to the success of furthering space exploration. Our United Way is grateful to be their partner. The Space Florida team has been one of

\$212,000

**TO SUPPORT
LOCAL PROGRAMS**

United Way's
top campaign
supporters –
both in
employee

participation percentage and per capita giving for the last 14 years. During those years, Space Florida employees have given over \$212,000 to support local programs helping those in greatest need in Brevard.

—ROB RAINS, PRESIDENT OF UNITED WAY OF BREVARD

SPACE FLORIDA LEADERSHIP

BOARD OF DIRECTORS



**LIEUTENANT GOVERNOR
JEANETTE M. NUÑEZ,**
Chair of the Board, State of Florida



JAY BEYROUTI
*President,
Monicarla, Ltd.*



JESSE BITER
*President & CEO,
Biter Enterprises, LLC.*



DEAN CANNON
*Executive Vice President,
Gray Robinson*



GREGORY CELESTAN
*Chief Executive Officer,
Celestar Corporation*



SONYA DEEN
*Vice President of Government Relations,
JM Family Enterprises, Inc.*



BARBARA ESSENWINE
*Vice President & Business Manager,
GCY, Inc.*



MORI HOSSEINI
*Chairman & CEO,
ICI Homes*



KENNETH KAHN
*President,
LRP Publications, Inc.*



BELINDA KEISER
*Vice Chancellor,
Keiser University*



KATHERINE SAN PEDRO
*Partner,
Ballard Partners*

EXECUTIVE STAFF



FRANK DIBELLO
*President &
Chief Executive Officer*



HOWARD HAUG
*Executive Vice President,
Treasurer & Chief Investment Officer*



DENISE SWANSON
*Chief Financial Officer &
Vice President of Administration*



JIM KUZMA
*Senior Vice President
& General Manager*



KEEVIN WILLIAMS
*Vice President, Special Projects
& Strategic Initiatives*



MARK BONTRAGER
*Vice President,
Spaceport Operations*



TODD ROMBERGER
*Vice President,
Commercial Space*



DALE KETCHAM
*Vice President,
Government & External Relations*



SHARON SPRATT
*Vice President,
Government Relations*



TONY GANNON
*Vice President,
Research & Innovation*



LOOKING AHEAD

This past year was again, a year for outstanding growth of our aerospace industry in Florida. And we saw continued evidence of the Cape Canaveral Spaceport clearly emerging as the world's premier space transportation hub and global leader in enabling commercial space industry expansion.

As a true indicator of that role as the nation's premier spaceport, as of June 30, 2020, the Cape Canaveral Spaceport had conducted 26 launches. And we are manifested to launch 40 or more this year, marking a renaissance era of extraordinary growth for commercial space in Florida!

With our continued emphasis to invest and modernize aged and underutilized federal infrastructure to support a growing commercial space marketplace, our goal for the next 10 years is to build the capacity and capability of the Cape Canaveral Spaceport to support 100 or more launches per year.

The next space era already reflects a transition from a government-led industry to one that is increasingly and inevitably more commercially market-driven. Last year, the global space marketplace grew to \$434 billion, with over 76% of that global revenue coming from commercial activity. That next era of launch activity will be accompanied by horizontal and vertical launches and landings of rockets and spacecraft that will be manufactured here. Spaceflight activities manned by both government and civilian astronauts, and a new era of space exploration, research, manufacturing and commercial service activity in Low Earth Orbit will be ushering in a new Cis-lunar space economy for Florida and the nation!

Our goal is to be the leading enabler of the myriad of companies that will be launching to go into space to conduct research, manufacture product, re-fuel, maintain and service in-space platforms, and both create and bring value back from space to Florida! We are on a path to become the leading Inter-stellar trade-port for the next century Cislunar economy!

As our industry continues to evolve, our statewide space and aerospace-related workforce and supporting communities will grow, as well. At Space Florida's Exploration Park, we are seeing the addition of more than 1,000 new workers that were not there two years ago. And statewide, Florida's aerospace industry is being recognized by companies domestically and globally who see the kind of business operating and living environment in which the next generation of aerospace development and manufacturing companies need to thrive. They are choosing Florida as "the place to be" for aerospace!

The future of this industry is very bright for Florida across the State and represents an increasingly important segment of Florida's economy.



FRANK DIBELLO
*President & CEO,
Space Florida*

S P A C E F L O R I D A



SPACE FLORIDA

505 Odyssey Way, Suite 300

Exploration Park, FL 32953

321.730.5301 | SPACEFLORIDA.gov