Supporting commercialisation and internationalisation in the space sector

Sandra Vogt
SME section
22 July 2022
ESA Agenda 2025
Five priorities with targets for 2025
Common European Space Vision for 2035+

1. ESA-EU relations
2. Commercialisation
3. Safety & security
4. Programme challenges
5. ESA transformation
Boost green and digital commercialisation

Number and value of deals in European space start-ups 2017-2021

3 ESA lines of action

Talent
Capital
Speed

Sources | ESPI 2022, Bryce 2022
ESA AMBITION ON COMMERCIALISATION

TO MAKE EUROPE A SPACE COMMERCIALISATION HUB

TO LAUNCH AND GROW GLOBAL SPACE COMPANIES THAT MAKE SENSE FOR OUR FUTURE

SPEED

TALENT

CAPITAL
For ESA, there are no “New Space companies”, but a New Space approach which can be observed from large well-established companies to small newcomer entities. This approach implies a business mindset based on private investments leveraging on speed, customer focus and new risk acceptance culture.
### ESA’s potential roles in New Space endeavours

<table>
<thead>
<tr>
<th>Support of Commercial development</th>
<th>Enabler</th>
<th>Accelerator</th>
<th>Reference Customer</th>
<th>“Traditional” Customer</th>
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<tbody>
<tr>
<td>Providing the right tools</td>
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<td>Supporting commercial takeoff</td>
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<td>(mature services or products)</td>
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<thead>
<tr>
<th>ESA</th>
<th>Business Development needed</th>
<th>Funding</th>
<th>Involvement in the development</th>
<th>ESA-driven requirements</th>
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- **Enabler**: Providing the right tools
- **Accelerator**: Supporting commercial takeoff
- **Reference Customer**: (mature services or products)
- **“Traditional” Customer**: Support of Commercial development
CM22 | Commercialisation related activities in ESA Programmes

D/EOP
- Incubed 2
- Φ-Sat

D/TIA
- Space for 5G
- Space Systems for Safety and Security (4S)
- Optical Communication ScyLight
- Future Preparation
- Core Competitiveness
- Partnership Projects
- BASS

D/STS
- Boost! 2.0 (Commercial Services; Support to MS; Service Procurement)

D/CIP
Commercialisation Services at ESA
InterDirectorate Commercialisation WG
- GSTP (Develop, Make, Fly)
- Incubed 2
- Ф-Sat
- Navisp (Element 2) Third Phase
- Optical Communication ScyLight
- Future Preparation
- Core Competitiveness
- Partnership Projects
- BASS

D/OPS
- S2P (COSMIC – Competitiveness )

D/NAV
- GSTP (Develop, Make, Fly)

D/TEC
- E3P Period 3 (BSGN and commercial mission support services)

D/HRE
- Commercialisation Services at ESA
- InterDirectorate Commercialisation WG
- GSTP (Develop, Make, Fly)
- Incubed 2
- Φ-Sat
- Navisp (Element 2) Third Phase
- Optical Communication ScyLight
- Future Preparation
- Core Competitiveness
- Partnership Projects
- BASS

commercialisation.esa.int
• Supports **New Space** developments, allowing companies to take more risks, hit the markets faster, attract investors, and introduce game-changing innovation.

• Is **domain independent**, including upstream and downstream.

• Does not address TRL maturation, but provides **end-to-end business support to innovation**.

• Offers to **all ESA Directorates** a platform to create new industrial players, explore new markets, and/or scale up promising companies emerging from their respective programmes.
Element 1: INNOVATE

Boosting innovation and commercialisation in the European space sector

- Foster and develop transformative innovations ready for market adoption by the ‘innovate and apply under-one-roof’ approach (Φ-labNET)
- Protection and commercialisation of industry IP (IP@ESA)
- Transfer of technology for commercial purposes (TT@ESA)
- ESA Business incubation centres network 2.0 (BICs)
- Reduce barrier to enter ESA Programmes (PrepareToESA)

Element 2: INVEST

Supporting the development of scale-up ventures in new space markets

- Business VALIDATION Phase: a network of business accelerators to support development of business plans, business strategies and growth roadmap
- Business GROWTH Phase: a marketplace for new space services and products e.g. IOD/IOV opportunities

CONNECTION WITH THE INVESTOR COMMUNITY
INDUSTRY SPACE DAYS 2022

ESA/ESTEC
NOORDWIJK, THE NETHERLANDS

28 | 29
SEPTEMBER 2022

DAY 1
9:30 - 17:30
B2B MEETINGS
EXHIBITION
CONFERENCE

17:30
NETWORKING DRINKS

DAY 2
9:00 - 17:30
B2B MEETINGS
EXHIBITION
CONFERENCE

SPACE FOR BUSINESS OPPORTUNITIES
#ISD2022ESA ISD.ESA.INT
COMMERCIALISATION GATEWAY

commercialisation.esa.int

Easy access for newcomers
One stop shop
Raising awareness on space opportunities
BUSINESS INCUBATION CENTRES

The largest network of space incubators in Europe
Accelerating commercial growth
Supporting entrepreneurs during the maturation
Pushing scale-up and growing the community of successful space related start-ups
Accelerate the future of Space via transformative innovation
Generating commercial competitive advantage
Facilitating investment actions
Technology scouting
Brokering introductions to potential clients
Business support and coaching
Technical feasibility and market analysis
Guidance and support on funding
SME OFFICE

SME INITIATIVE
SUPPORTING YOUR BUSINESS WITH ESA

SME Information and support
Helpdesk dedicated to SMEs
Training, Networking and Matchmaking
Global Space Markets Challenge 2021

What?

- Competition launched by ESA with the operational and technical support of Eurisy
- Selection of 6 SMEs in the space sector (3 in the upstream and 3 in the downstream area) submitting the most promising and convincing internationalisation plans for their products and/or services

Why?

- Support European space start-ups and SMEs in their internationalisation efforts and the development of networks in new markets;
- Promote start-up and SME capabilities and know-how, in Europe and abroad.
### Top 12 Participants

<table>
<thead>
<tr>
<th>Company</th>
<th>Country</th>
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<tbody>
<tr>
<td>Lios</td>
<td>Ireland</td>
</tr>
<tr>
<td>Technology for Propulsion and Innovation</td>
<td>Italy</td>
</tr>
<tr>
<td>Pasquali Microwave Systems Srl</td>
<td>Italy</td>
</tr>
<tr>
<td>DcubeD (Deployables Cubed GmbH)</td>
<td>Germany</td>
</tr>
<tr>
<td>Lens Research &amp; Development</td>
<td>Netherlands</td>
</tr>
<tr>
<td>EICAS AUTOMAZIONE SpA</td>
<td>Italy</td>
</tr>
<tr>
<td>LATITUDO 40 S.R.L.</td>
<td>Italy</td>
</tr>
<tr>
<td>SatADSL</td>
<td>Belgium</td>
</tr>
<tr>
<td>SatSense Solutions Limited</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>A.U.G Signals Ltd</td>
<td>Canada</td>
</tr>
<tr>
<td>Detektia Earth Surface Monitoring S.L.</td>
<td>Spain</td>
</tr>
<tr>
<td>EOMAP</td>
<td>Germany</td>
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</table>
• **Competition objectives:**
  - highlight the increasingly important role of start-ups in the space ecosystem
  - give visibility to innovative European start-ups and encourage and support their development

• **Participants:**
  - entrepreneurs in [ESA Member States](#) developing innovative services and/or products using space technology
ESA Start-Up Competition 2020 - Winners

1st
Cosmic Srl, Italy

2nd
Hawa Dawa, Germany

3rd
Orbital EOS, Spain

3rd
ConstellR, Germany
Thank you for your attention!