

# Overview of the ESA commercialisation opportunities

*e-shape solutions: Earth Observation  
for biodiversity and water management*



## ESA COMMERCIALISATION GATEWAY

SPACE FOR BUSINESS  
BUSINESS FOR SPACE

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# THE NEW SPACE ECONOMY



LAUNCH PRICE  
TO BE DIVIDED  
BY 3 IN NEXT 10Y

HIGHER PAYLOAD CAPACITY  
AND LAUNCH RATE

DEORBITING REGULATIONS

SPACE-AS-A-SERVICE

EDGE-COMPUTING/AI  
FOR GROUND SEGMENTS  
AND SPACE DATA

GREEN/ELECTRIC PROPULSION

IN ORBIT SERVICING,  
MANUFACTURING, ASSEMBLY



Avg. Satellites  
launched/year  
**382**<sup>2021</sup> → **1,704**<sup>2031</sup>

**x4.5**  
demand  
increase

**80%**  
to come from  
constellations

**75%**  
revenues to  
come from  
govt.

Global Private Space Investment

**13 B€** in 2021 → **+95%** since 2020

Global Public Space Investment

**93 B€** → **113 B€**





# ONE ROCKET LAUNCH ALMOST EVERY TWO DAYS



# BUT THIS ISN'T ONLY HAPPENING ACROSS THE OCEAN



# THE NEW EUROPEAN SPACE AGE

**11.9 B€**

(+7%) of European  
institutional space  
investment in 2021

**+14%**

Private investment in  
European space start-ups  
to grow in 2021-ups

**7.5 B€**

of European  
upstream revenues  
in 2021



# TODAY WE START BUILDING THE FOUNDATIONS OF THE EUROPEAN BUSINESS JOURNEY

# COMMERCIALISATION IN AGENDA 2025 AND THE 3 DRIVERS





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.





# THE ARENAS WE WILL PLAY IN

NON SPACE  
COMPANIES

INVESTORS

STARTUPS

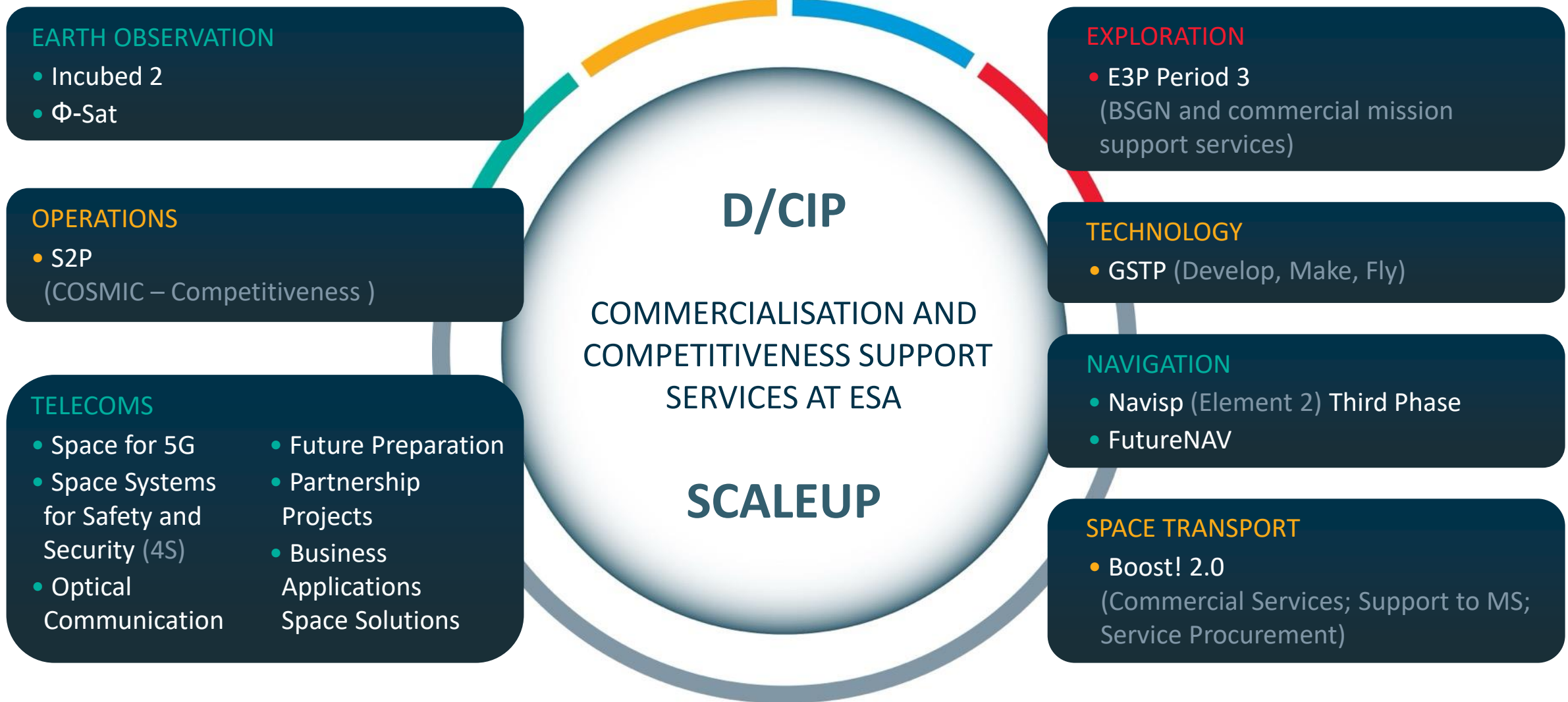
INSTITUTIONS

ACADEMIA

SPACE  
COMPANIES

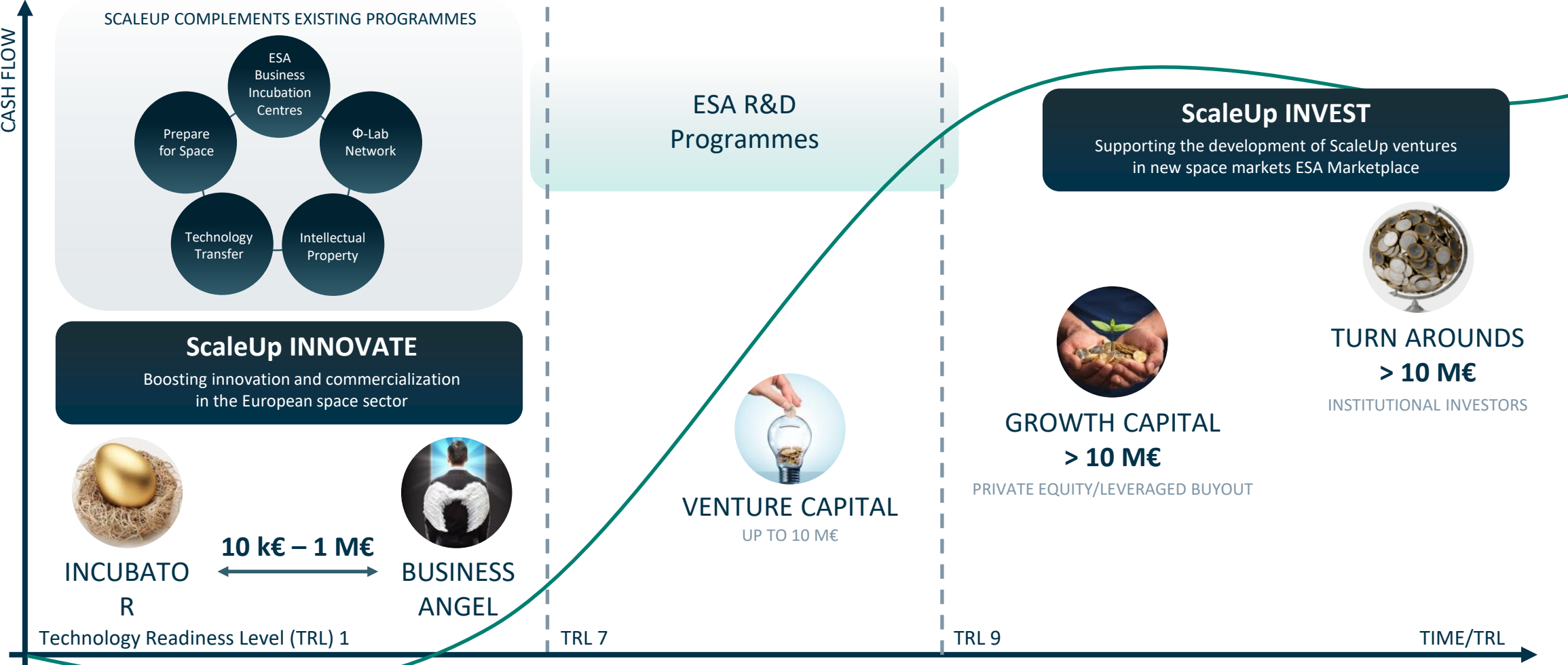
# COMMERCIALISATION@ESA







# CONTRIBUTIONS IN THE COMPANY'S LIFE-CYCLE





# CM 22 OUTCOME FOCUS SCALEUP

**117.6 M€**

TOTAL  
SUBSCRIPTIONS

OVERSUBSCRIPTION  
OF

**+17.6%**

INNOVATE ELEMENT  
FUNDED WITH

**96.6 M€**

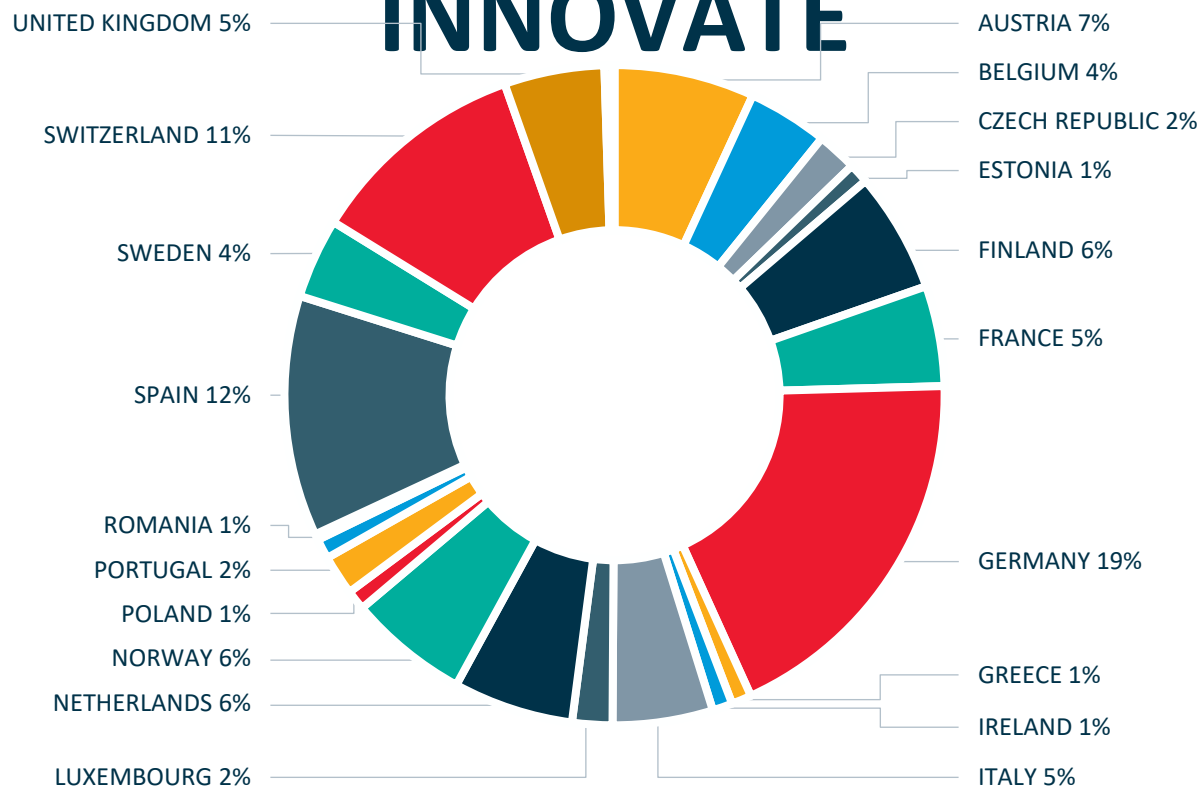
INVEST ELEMENT  
FUNDED WITH

**21 M€**

# ELEMENT 1

1

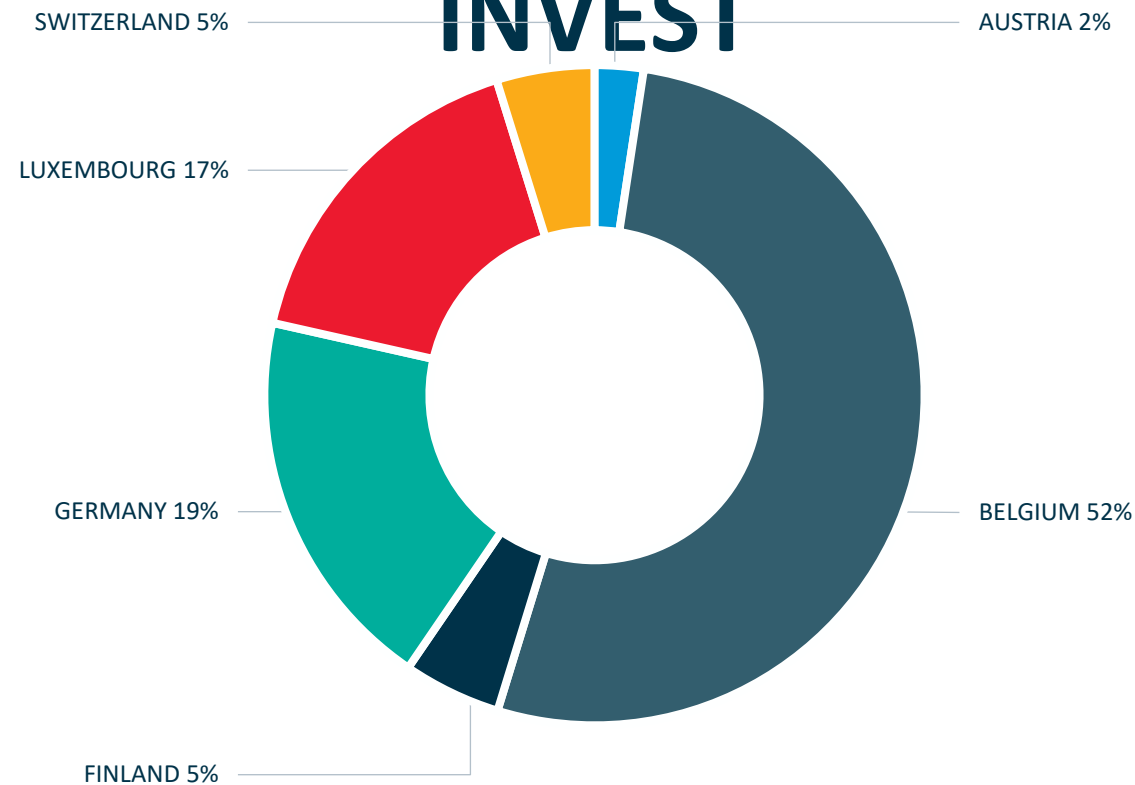
## INNOVATE



# ELEMENT 2

2

## INVEST





# SERVICES DELIVERED BY THE COMMERCIALISATION DEPARTMENT

THE **ENTRY POINT**  
TO ALL ESA  
COMMERCIALISATION  
SERVICES



MARKET INTELLIGENCE FOR ESA PROGRAMMES, INVESTORS AND ESA COMMERCIALISATION NETWORK

A '**ONE-STOP SHOP**' SERVICE FOR ALL COMMERCIAL OPPORTUNITIES

A WEBSITE, SOCIAL MEDIA CHANNELS AND NEWSLETTERS TO **GIVE VISIBILITY TO ESA'S COMMERCIAL INITIATIVES**

AN **EASY ACCESS** TO ESA COMMERCIALISATION SERVICES AND NETWORKS OF RESOURCES

**AWARENESS AND SUPPORT** FOR THE USE OF SPACE INFRASTRUCTURE AND DATA FOR APPLICATIONS AND SERVICES

**3000+** SMEs  
REGISTERED  
WITH ESA

**1380** SMEs  
CONTRACTED\*

\*JUNE 2022

**9.6%**  
COMMITMENTS  
TO SMEs\*

\*PERIOD 2017–2021



THE ACTIVITIES OF THE SME OFFICE ADDRESS THE FOUR MAIN AREAS OF THE SME POLICY:

**GENERAL SUPPORT MEASURES**

Point of contact SME, Training Courses, Networking & Visibility (esa-match, ISD), Supporting Awareness of ESA Business Opportunities, Analyses and surveys

**PROCUREMENT MEASURES**

Reserved Share for SMEs in the Frame of Large Procurements, Model-subcontracts, COVID-19 measures, ...

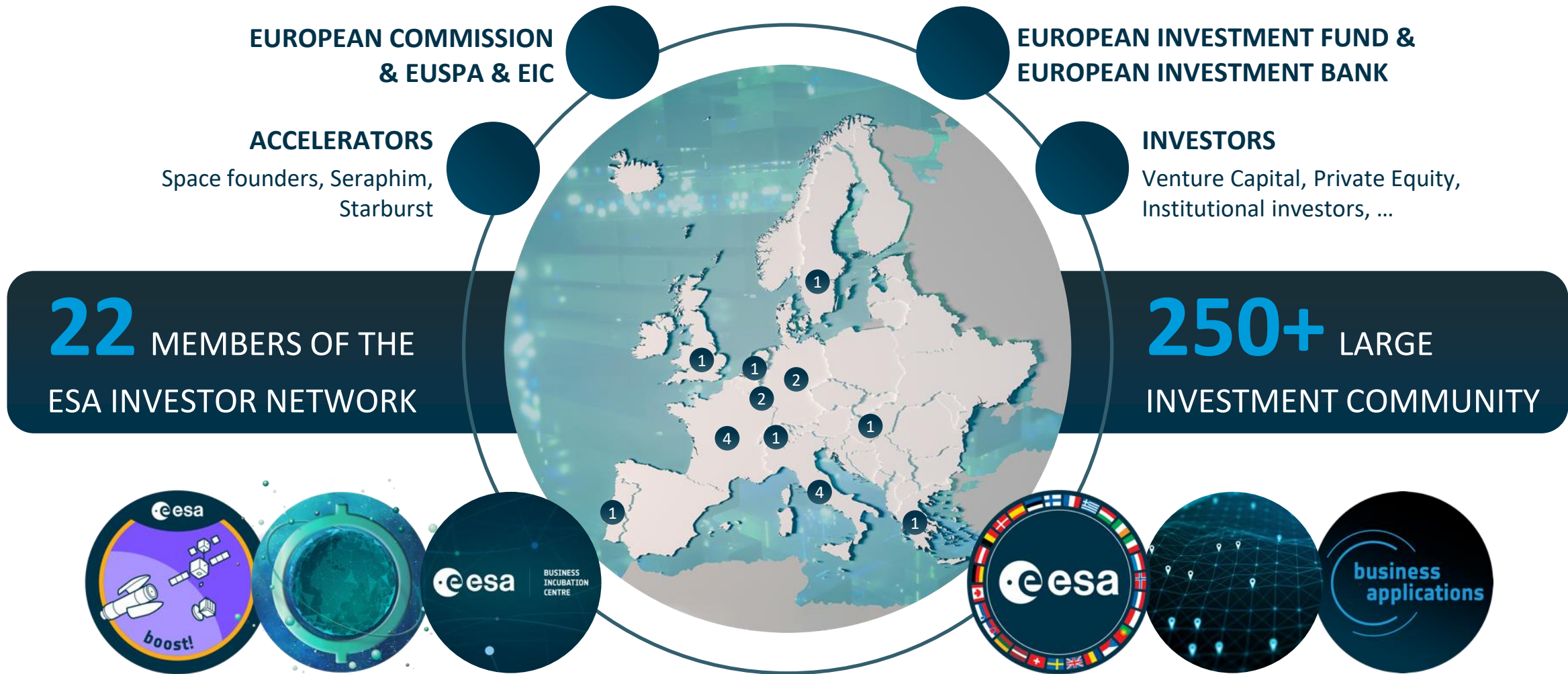
**INDUSTRIAL POLICY MEASURES**

SME specific procurement clauses, Advance Payments, ...

**FINANCIAL MEASURES**

Financial viability of SME, Neutral Cash flow, Access to Finance





## ESA BICs

Foster start-up firms that set-up a new and innovative business using space-oriented technology, or data derived from space assets, for products and services in both space and terrestrial markets

## ESA TECHNOLOGY TRANSFER

Support technology transfer and appliances between established industry from the space and non-space sector, and within the space sector

## ESA $\Phi$ -LAB NETWORK

Facilitates research teams to engage in groundbreaking science and technology development that have a potential in high-yield commercialisation



$\Phi$ -LAB  
NETWORK

ESA-WIDE COVERAGE  
IN MULTIPLE  
MEMBER STATES

GROUND-BREAKING  
RESEARCH, DIVIDING  
COMMERCIAL  
TECHNOLOGIES

FOR PhDs  
AND RESEARCHERS



BUSINESS  
INCUBATION

29 CENTRES

>90 LOCATIONS

200 NEW  
STARTUPS P/Y

1450  
STARTUPS SELECTED



TECHNOLOGY  
TRANSFER

8

TECHNOLOGY  
BROKERS

404

TECHNOLOGY  
TRANSFERS



PARTNERSHIPS

FOR ENTREPRENEURS,  
CORPORATES, INSTITUTES,  
AND BUSINESS SCHOOLS

SUPPORTS START-UPS,  
ALUMNI AND  
NEWCOMERS

CONNECTING TO  
CURRENT & FUTURE  
DECISIONMAKERS

Foster the **development of industrial players** on new and emerging upstream and downstream markets



ASSESS THE MOST CREDIBLE OPTION FOR SCALING UP SUPPORTED BY **INVESTORS**

AGGREGATE THE **DEMAND** OF THE SERVICE

AGGREGATE THE SERVICE PROVIDERS ON THE SUPPLY SIDE (“**THE OFFER**”)

CREATE AND MAINTAIN **ESA MARKETPLACE**



# ESA Marketplace: A digital platform tool



1<sup>st</sup> version already available within ESA-Match

The navigation menu features four main categories, each with an icon and a brief description:

- Marketspace** (Megaphone icon): Let others know about your needs, ideas and upcoming projects and search for suitable collaborators
- Student Opportunities in Industry** (Graduation cap icon): Let students know about your job opportunities ESA Interacts
- Tender Actions** (Handshake icon): See Tender Actions in open competition and identify the right partners and business opportunities
- ESA Interacts** (Clipboard icon): See published ESA Interacts and identify opportunities to participate

The search results page displays a list of service offerings:

- Cybersecurity services**: We Offer a service. Published by: 1000035140 - Helix Space. Helix Space assesses or audits your cybersecurity stand based on internal or external requirements.
- Product/Market Fit services**: We Offer a service. Published by: 1000035140 - Helix Space. We help you achieve Product/Market Fit for your SpaceTech product or service.
- Soft Funding services**: We Offer a service. Published by: 1000035140 - Helix Space. We help you obtain the funding you need to develop your SpaceTech product or service.

**Ad Details**

**XRTC Performance Analysis**

VS

webex by Cisco, zoom, FaceTime by Apple, Teams by Microsoft, Google Meet, skype by Microsoft

**XRTC Ultra Low-Latency Streaming**

We are looking for: consortium member

Partners wanted for PoCs to replace legacy RTMP, LL-HLS, WebRTC with XRTC for subsecond TCP streaming

Entity Information: DELTA CYGNI LABS, 1000024364 - 800006963, FI-Finland

Published on: 19/12/2022, Expiration Date: 19/06/2023, Type of Entity Wanted: Any, Status: Published

We are looking for PoCs and partners where we can demonstrate the capabilities of XRTC streaming protocol in real-time remote control, AI, analytics application, where a stream of data needed to be transferred bi-directionally with sub-second latency (100ms on the cross-Europe scale). Read more: <https://xrtc.org>

Read Less

CLOSE



# ESA Marketplace: A digital platform tool



Today the **Marketspace** allows all Legal Entities from ESA MS, Associate States, and Cooperating States to publish their ads

## We are looking for

Select all

Clear selection

- a consortium member
- a research partner
- a technical partner
- a service
- a product
- a technology
- other

[^ Show less](#)

## We offer

Select all

Clear selection

- a consortium membership opportunity
- a research partnership opportunity
- a technical partnership opportunity
- a service
- a product
- a technology
- a challenge
- a spin-in opportunity
- a technology transfer opportunity
- other

[^ Show less](#)

Economic Operators supported by INVEST – identified by “*supported by ScaleUp*” label – will be clearly highlighted in the **Marketspace** digital tool

*Application Programming Interface (API) for connecting with other existing platforms will be available in June 2023*



ESA UNCLASSIFIED – For ESA Official Use Only



# TOGETHER WE INVEST AND INNOVATE YOU SCALE UP!



[COMMERCIALISATION.ESA.INT](https://COMMERCIALISATION.ESA.INT)

# Lilium

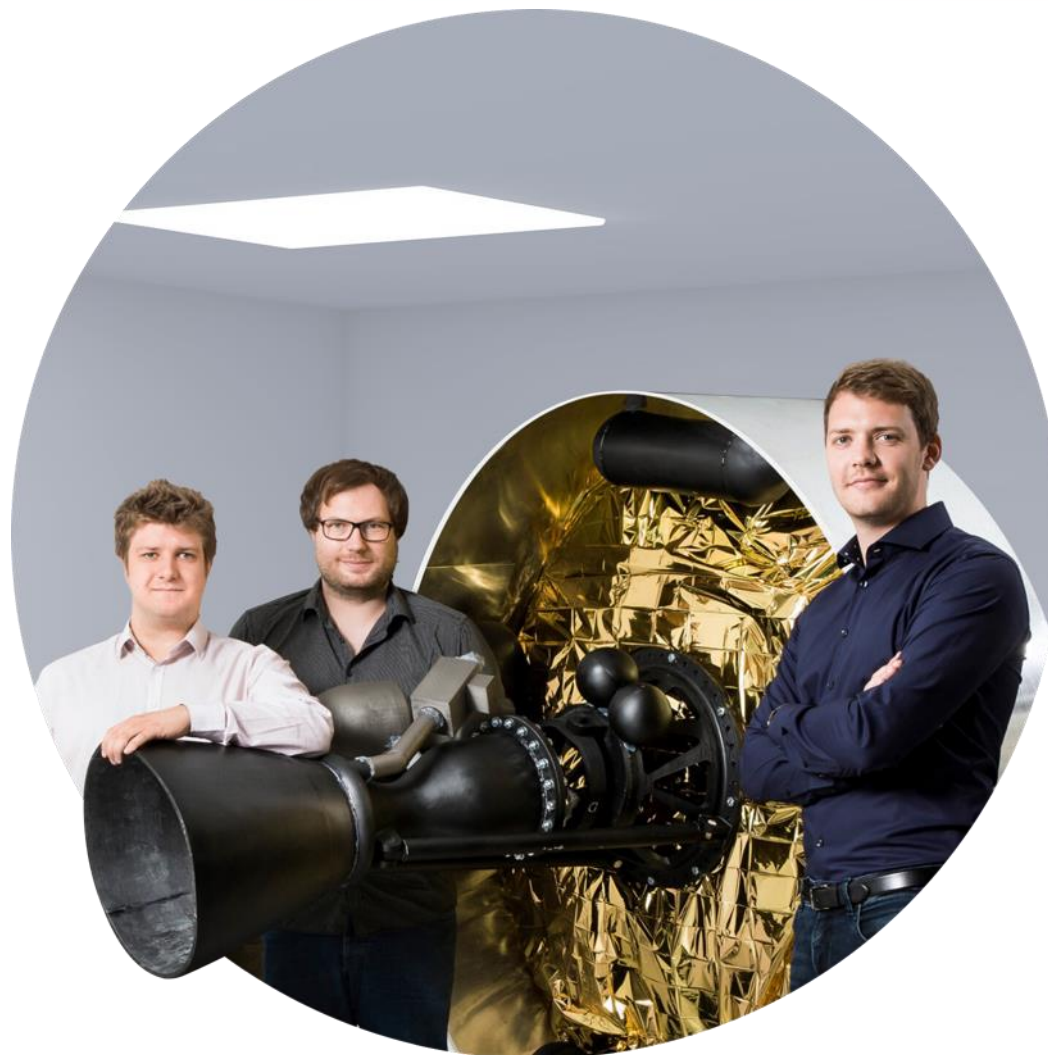


**12**  
INVESTORS

**826.4 M\$**  
TOTAL FUNDING  
RAISED



# Isar Aerospace



**13**  
INVESTORS

**182.6 M\$**  
TOTAL FUNDING  
RAISED



# ME Vitae



**6**  
INVESTORS

**1.7 M\$**  
TOTAL FUNDING  
RAISED

# ArchAI



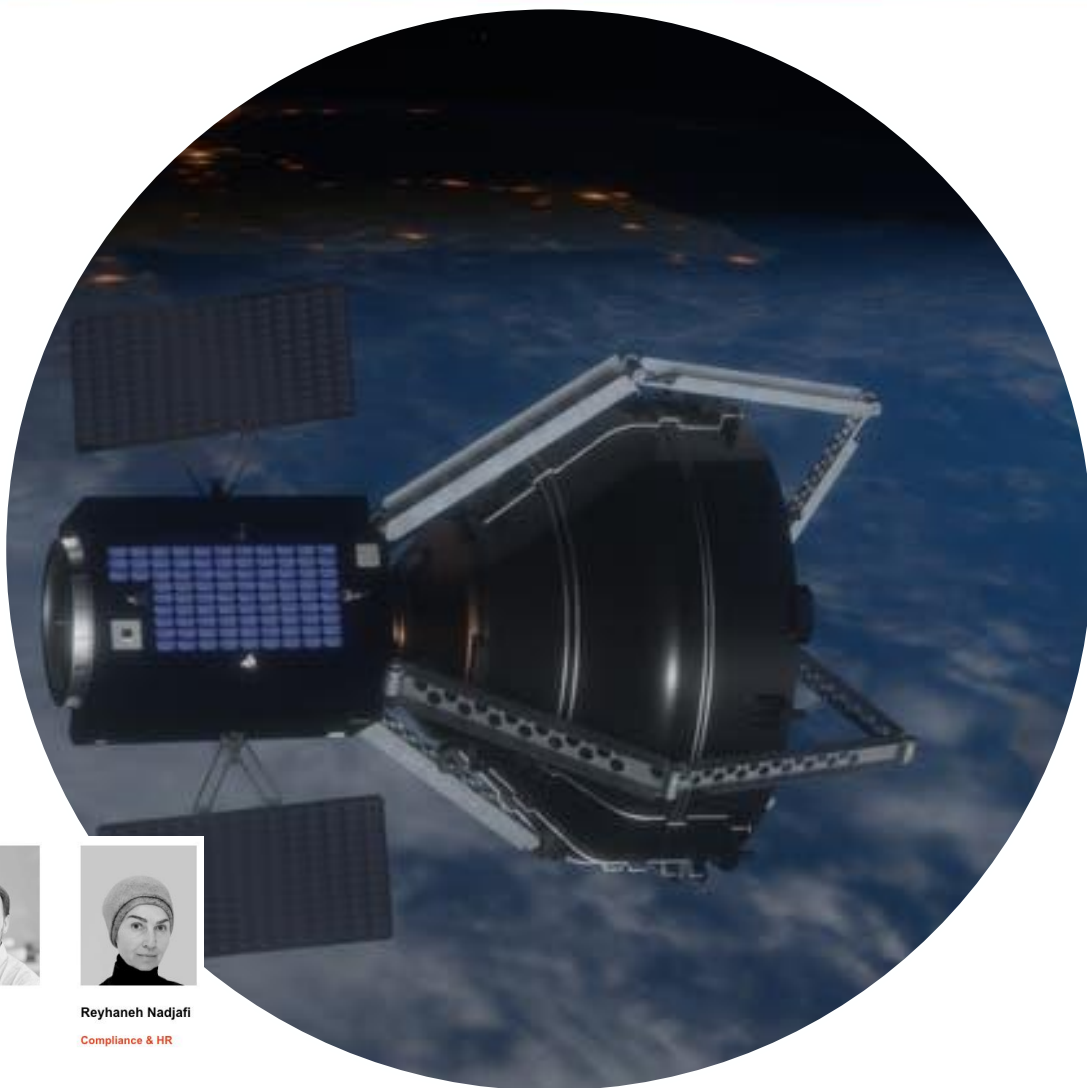
**DR IRIS KRAMER**  
EARLY CAREER  
ARCHAEOLOGIST

2021 HIGHLY COMMENDED  
BY COUNCIL FOR BRITISH  
ARCHAEOLOGY

INNOVATE UK YOUNG  
INNOVATORS AWARD 2022-  
23



# clearspace today



FOUNDED  
**2018**  
**800+ YEARS**  
COMBINED  
SPACE  
EXPERIENCE  
**~€80 M**  
CONTRACT by  
ESA to remove  
debris from Orbit



Luc Piguet  
Management



Muriel Richard  
Engineering



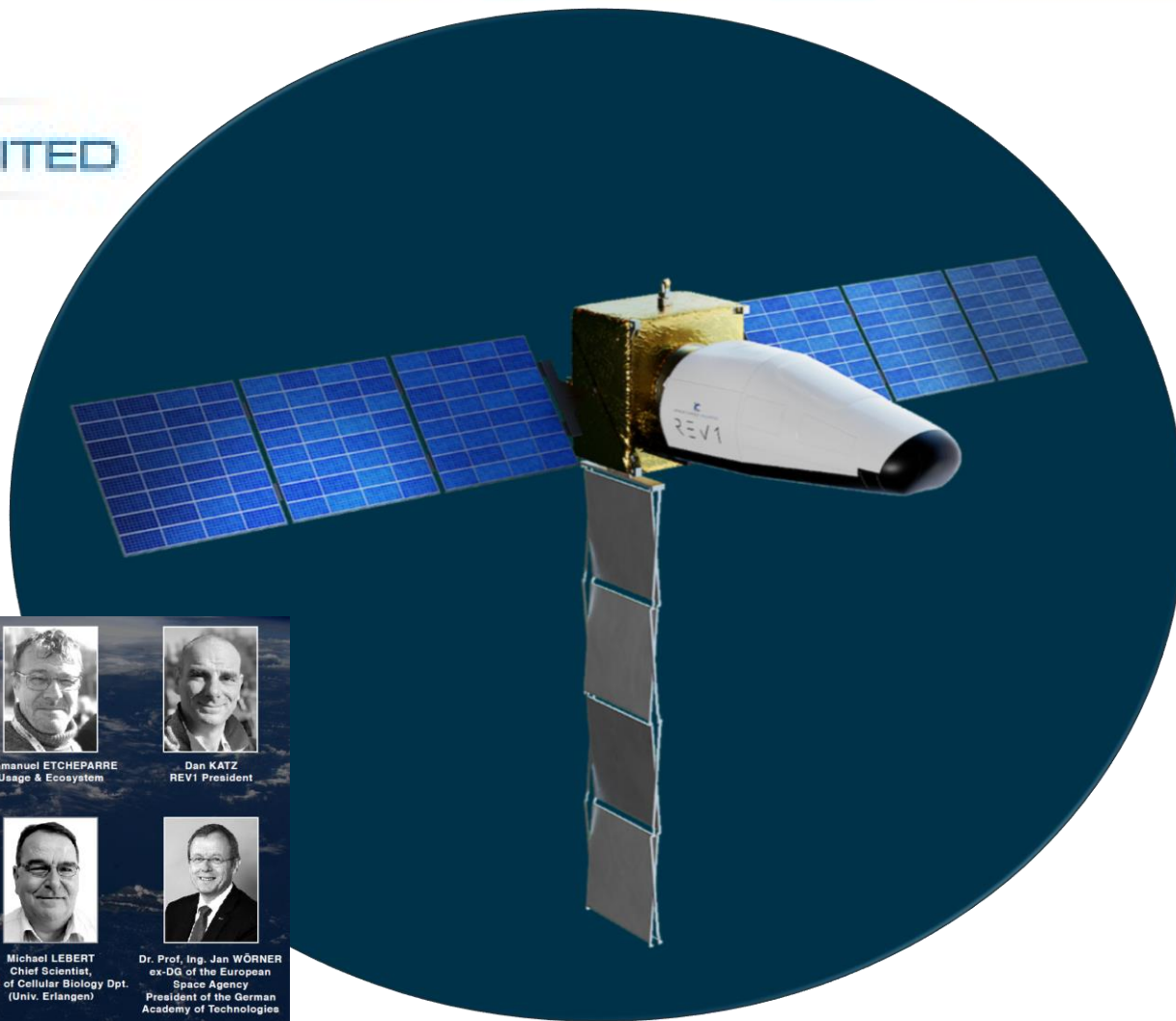
Tim Maclay  
Technology



Reyhaneh Nadjafi  
Compliance & HR



SPACE CARGO UNLIMITED



FOUNDED  
2020

March 2021  
Apply to  
ESA BIC Turin





# THANK YOU FOR YOUR ATTENTION

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