

JOIN THE BUSINESS JOURNEY

ESA COMMERCIALISATION GATEWAY

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NEW SPACE AGE, NEW SPACE APPROACH

COMMERCIALISATION.ESA.INT



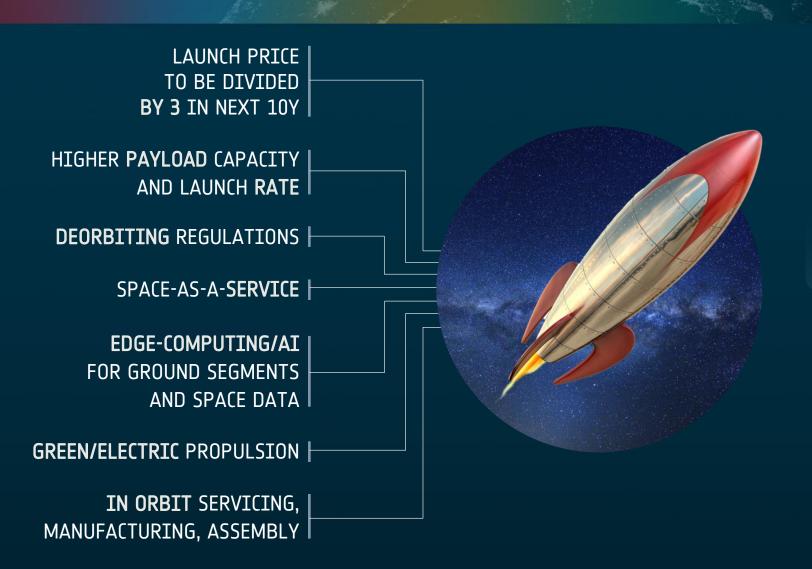
THE NEW SPACE ECONOMY





THE NEW SPACE ECONOMY





Avg. Satellites launched/year 2021–2031

382 → **1,704**

x4.5 demand increase

80% to come from constellations

75% revenues to come from govt.

Global Private Space Investment

13 B€ +95% in 2021 since 2020

Global Public Space Investment

93 B€ → **113** B€

THE NEW SPACE AGE





8.02 B€

global institutional space investment worldwide in 2021

+4% since 2020



13 B€

global private space investment in 2021

+95% since 2020

1,819
satellites
put into orbit in 2021
4x more than
in 2019 (457)



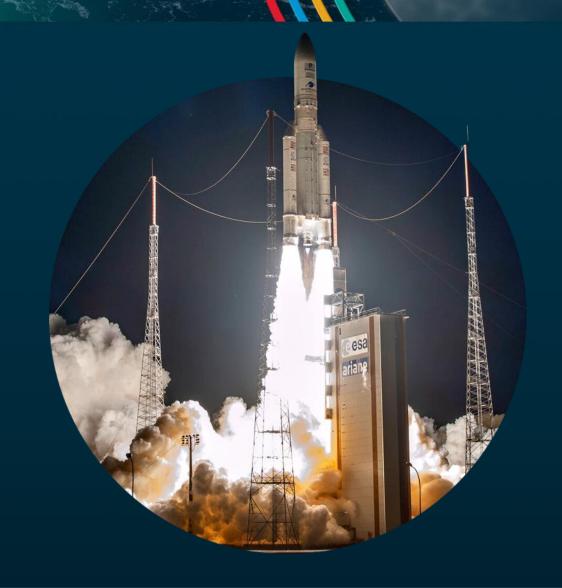
95% of smallsats

(<500kg)





ONE ROCKET LAUNCH ALMOST EVERY TWO DAYS



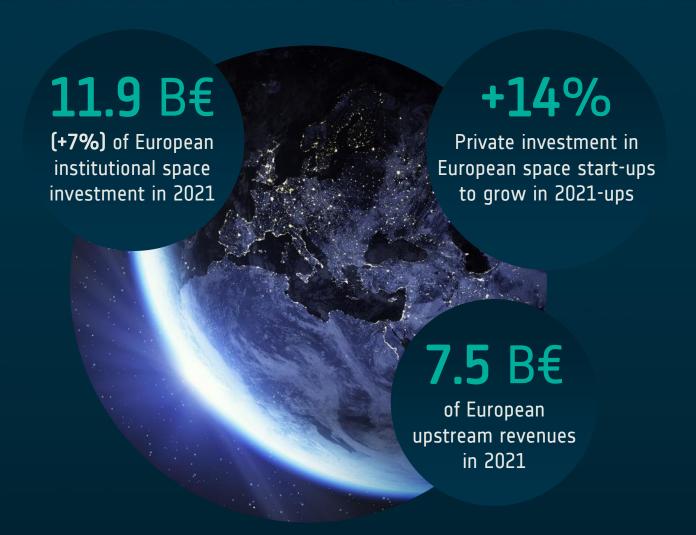


BUT THIS ISN'T ONLY HAPPENING ACROSS THE OCEAN





THE NEW EUROPEAN SPACE AGE





TODAY WE START BUILDING THE FOUNDATIONS OF THE EUROPEAN BUSINESS JOURNEY





COMMERCIALISATION IN AGENDA 2025 AND THE 3 DRIVERS







ESA AMBITION ON COMMERCIALISATION

TO MAKE EUROPE
A SPACE COMMERCIALISATION HUB
TO LAUNCH AND GROW GLOBAL
SPACE COMPANIES THAT
MAKE SENSE FOR OUR FUTURE



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→ THE EUROPEAN SPACE AGENCY

ESA AND NEW SPACE

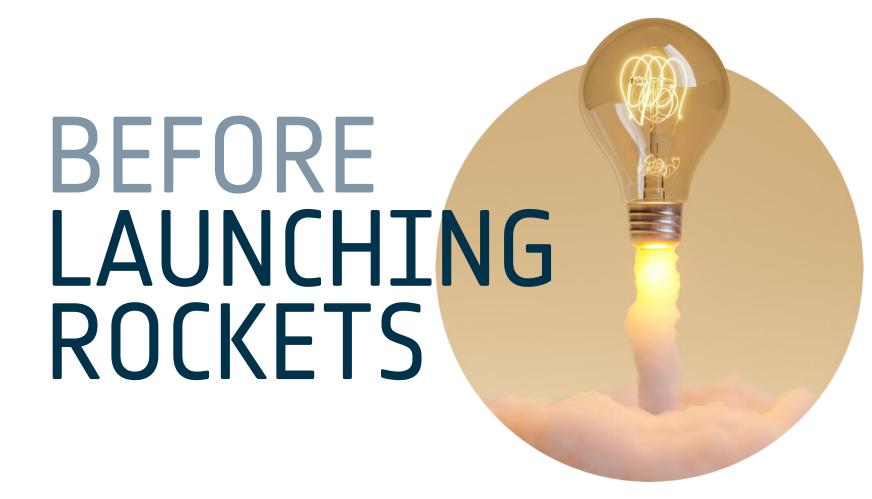


For ESA, there are no "New Space companies", but a New Space approach which can be observed from large well-established companies to small newcomer entities. This approach implies a business mindset based on private investments leveraging on speed, customer focus and new risk acceptance culture.

SPEED UP
TIME
TO MARKET

CUSTOMER-ORIENTED: GOOD ENOUGH VS BEST IN CLASS NEW APPROACH TO PROJECT MANAGEMENT AND RISK ACCEPTANCE

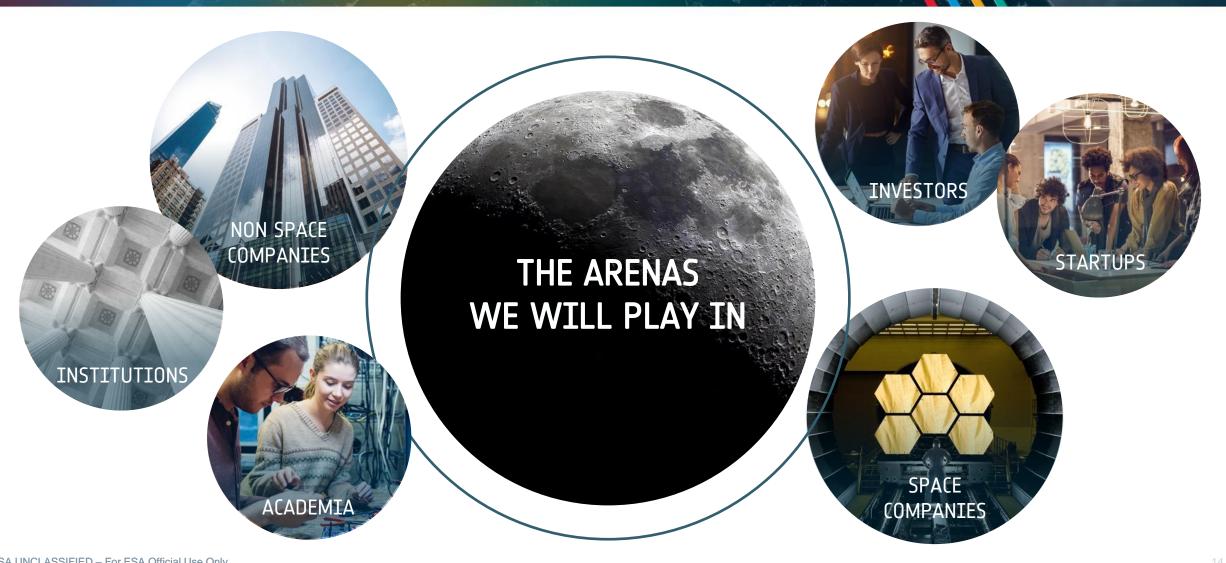




WE LAUNCH IDEAS







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→ THE EUROPEAN SPACE AGENCY



COMMERCIALISATION @ESA





EARTH OBSERVATION

- Incubed 2
- Ф-Sat

OPERATIONS

S2P (COSMIC – Competitiveness)

TELECOMS

- Space for 5G
- Space Systems for Safety and Security (4S)
- OpticalCommunication

- Future Preparation
- Partnership Projects
- BusinessApplicationsSpace Solutions

D/CIP

COMMERCIALISATION AND COMPETITIVENESS SUPPORT SERVICES AT ESA

SCALEUP

EXPLORATION

E3P Period 3
 (BSGN and commercial mission support services)

TECHNOLOGY

GSTP (Develop, Make, Fly)

NAVIGATION

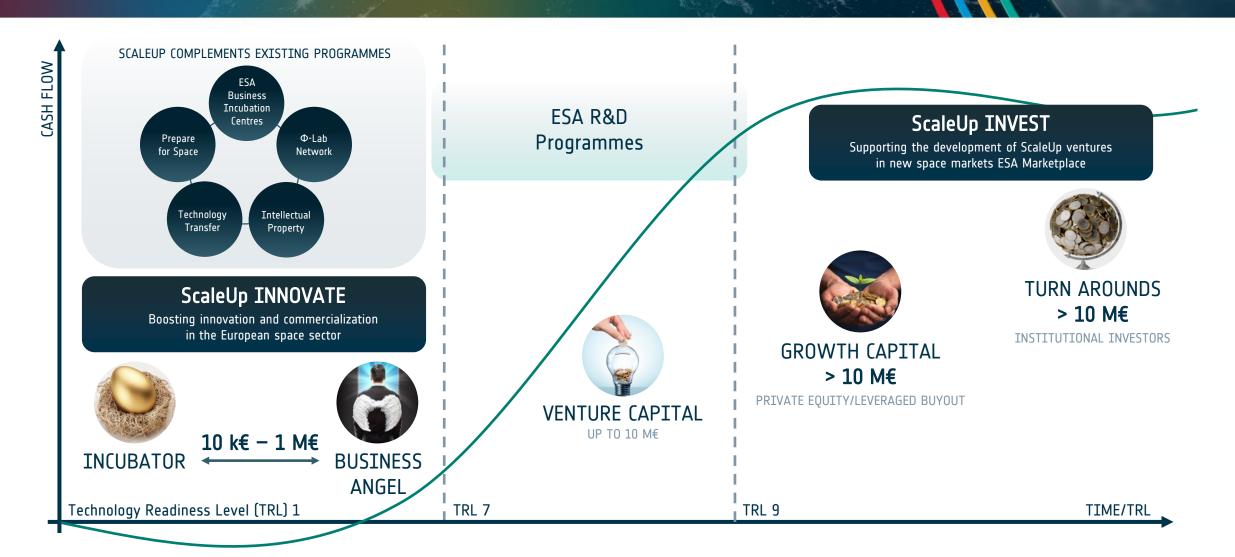
- Navisp (Element 2) Third Phase
- FutureNAV

SPACE TRANSPORT

Boost! 2.0
 (Commercial Services; Support to MS; Service Procurement)

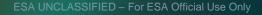
CONTRIBUTIONS IN THE COMPANY'S LIFE-CYCLE







SERVICES DELIVERED BYTHE COMMERCIALISATION DEPARTMENT



ESA Commercialisation Gateway

THE ENTRY POINT TO ALL ESA COMMERCIALISATION SERVICES





MARKET INTELLIGENCE FOR ESA PROGRAMMES, **INVESTORS AND ESA** COMMERCIALISATION **NETWORK**

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

A 'ONE-STOP SHOP' SERVICE TO CONNECT **NEW SPACE WITH**

Ongoing and Planned market studies

- ESA/EIB Financing gaps of selected upstream segments (with HRE, EOP and STS)
- Post-ISS scenarios (with HRE)
- Automotive/transport (with **Einstein Ventures**)
- +60,000 website visits
- +2,250,000 social media reach
- +200% new followers
- +7500 newsletters reach
- +50 new articles/news/posts monthly.
- x4 benchmark of similar platforms

Events with ESA BIC network & ESA programmes: e.g., VIVATECH, SLUSH, annual network meetings... and much more

https://commercialisation.esa.int























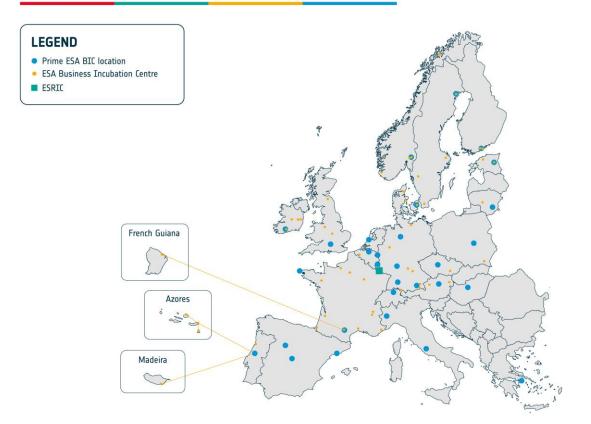




BUSINESS INCUBATION CENTRES



ESA BUSINESS INCUBATION CENTRES MAP



29
INCUBATION CENTRES

200 START-UPS SELECTED ANNUALLY

1,450+ START-UPS SELECTED OVERALL







































BUSINESS INCUBATION CENTRES





USE OF ESA BIC

TECHNICAL SUPPORT



OFFICE SPACES AND SHARED FACILITIES



NETWORKING FOR START-UPS



60 k€ NON-EQUITY **FUNDING**



DOOR OPENER TO **INTERNATIONAL INVESTORS**





























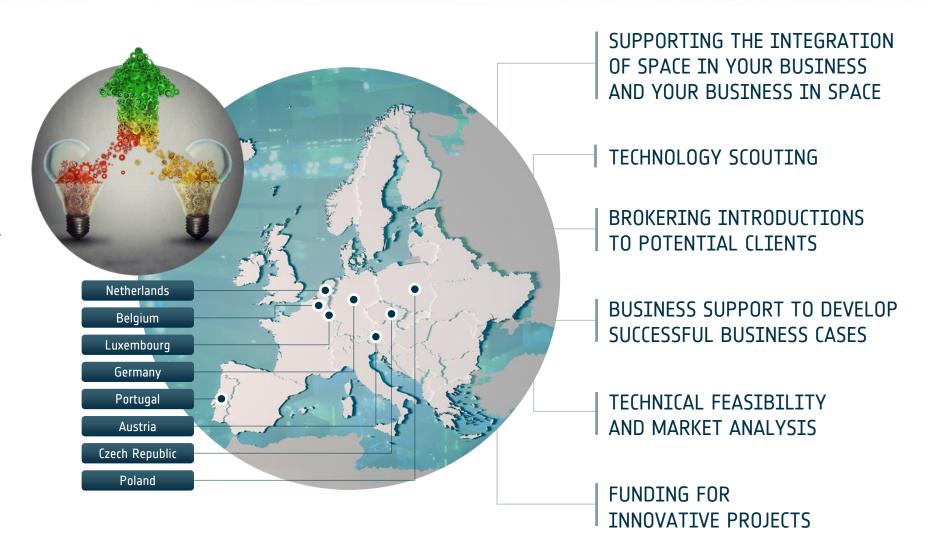




TECHNOLOGY TRANSFER



ESA
TECHNOLOGY
BROKER
NETWORK



Φ-LAB NETWORK





PROMOTE RESEARCH ACTIVITIES THAT USE SPACE

SCOUT FOR TALENTED RESEARCH PROJECT TEAMS WITH DISRUPTIVE INNOVATION IDEAS THAT HAVE COMMERCIAL POTENTIAL

SUPPORT THE CREATION OF NEW TECHNOLOGY AND RESEARCH INSIGHTS IN BOTH UPSTREAM AND DOWNSTREAM MARKETS

PROCURE INNOVATIVE
TECHNOLOGIES AND THEIR
APPLICATIONS

DISSEMINATE AND MARKET
THE TRANSFORMATIVE SOLUTIONS
FOR COMMERCIAL APPLICATION

Competitions to stimulate the eco-system



ESA Payload Masters with The Exploration Company

ESA will offer to the two winners of the competition, the possibility to commit two payloads of 10 kg each for this mission on board NYX. <u>Selection April 2023</u>

Grand Challenges

ESA, D-Orbit, Caracol - Grand Challenge

The competition sponsored by D-Orbit, it aims at developing a composite materials 3D printing process that can be operated in microgravity and in reduced gravity environment.

Kick-off April 2023

Metalysis - ESA Grand Challenge

The competition sponsored by Metalysis, will reward any technology that enables us to produce metals from materials found on lunar surface and planets.

Finish July 2023





New Space Global Markets Challenge

The competition aims at selecting 8 space start-ups based on most promising internationalisation plan to pitch at the Paris Air Show. Top 2 winners provided tickets to an international event – World Satellite Business Week. On-going

































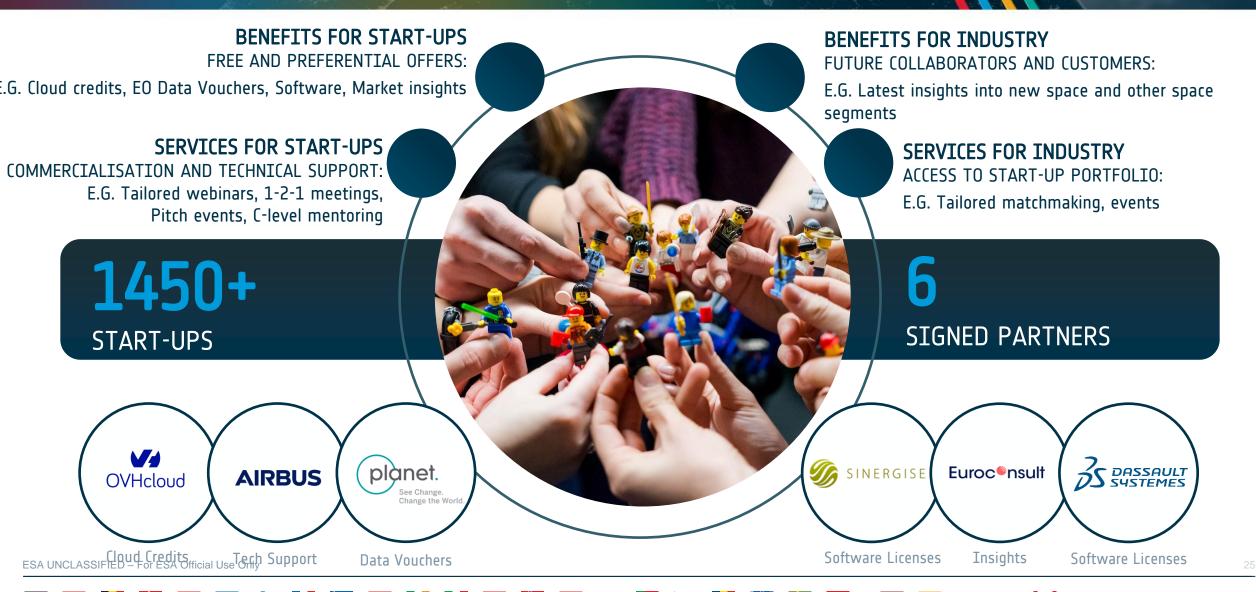






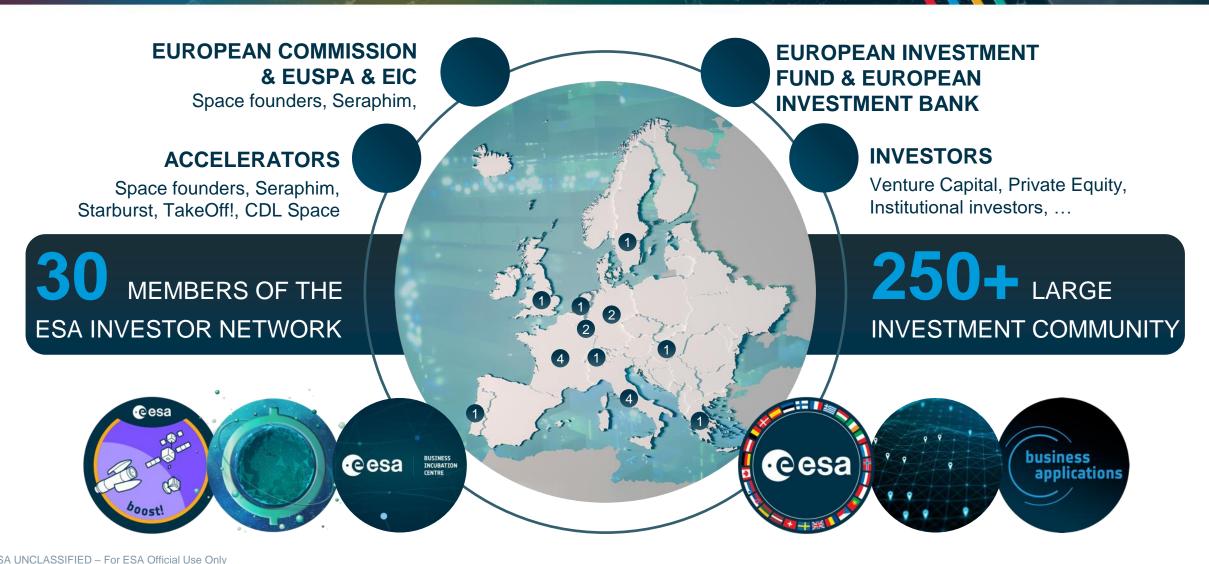
ESA Partnership Initiative for Commercialisation (EPIC)





INVESTOR Partnerships







TOGETHER WE INVEST AND INNOVATE YOU SCALE UP!







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